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Strategies for Succession Planning of Retiring Baby Boomers

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This is to certify that the doctoral study by

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Walden University
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Abstract

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MA, Webster University, 2009

MS, Webster University, 2007

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Doctoral Study Submitted in Partial Fulfillment

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Abstract

In 2020, over 20 million baby boomers retired, with an annual average growth of two million yearly. The continuous trend of baby boomers retiring from the workforce has leaders focusing on the replacement of one of the largest working classes that the world has seen. Grounded in transformational leadership theory, the purpose of this qualitative single case study to explore succession planning strategies human resources managers use to manage the transition of experience, knowledge, and skills influenced by retiring baby boomers. Five human resources leaders from the southeastern United States participated in semi-structured interviews. The data were analyzed using thematic analysis. Four-themes emerged: the need to implement succession planning, succession planning strategies, human resources' role in succession planning, and the knowledge transfer process in succession. A key recommendation is for leaders to provide a visual aid to foresee what may be lost from retiring baby boomers and what is to gain with future successors. The impact of social change includes the potential to apply and develop succession planning strategies for future generations to provide career advancement, social responsibility, sustainability, and success in all environments.

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Dedication

This doctoral study is dedicated, first and foremost, to my daughter Saleah McFadden. My loving daughter, you have watched your mother achieve this goal for years. I am so glad as your mother to show you that anything is possible through prayer, persistence, and love. I also dedicated this to my mother, Ola Mae McFadden, without you, I would not have been able to achieve any of my educational and career goals. Thank you for everything you have done for me. I want you to know you are appreciated and loved beyond measure.

I also want to thank all my family and friends who stood by me and inspired me to keep going when all I wanted to do was give up. I also want to thank my church families for praying for me and cheering me on until I reach the finish line. In honor of my dad, the late Walter L. McFadden, thank you for raising me to be the hard worker I am and showing me that nothing is impossible. Thank you, and God Bless you all.

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I want to thank God for being the head of my life and providing the faith, strength, endurance, and patience to accomplish this goal. I would not have been able to complete this study without you. I want to thank my committee, Dr. Erica Gamble, Dr. Brandon Simmons, and Dr. Judith Blando, for giving me support, value, and inspiration on this doctoral journey. I also want to thank my cohort members for their assistance and reassurance along this journey. I genuinely pray endless blessings for you all.

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Section 1: Foundation of the Study

The vast rate of baby boomers retiring has left organizational leaders pondering how to successfully replace such a massive loss to the workplace (Grimaldi, 2021). Employers must act rapidly to minimize the effect of retiring baby boomers leaving the workforce. By establishing succession planning as a strategic precedence, leaders ensure that their organization plans for demographic transformation and avoid losing the sustainability of an organization (Al Suwaidi et al., 2020). Generations X, Y, and Z must be developed and trained through succession planning strategies to fulfill future vacancies successfully. During reviewing succession planning strategies for retiring baby boomers, the role of human resources is viewed as a pertinent division to execute succession planning. In Section 1, I address leaders' attention to focus on the future to meet placement demands (Cortes & Hermann, 2021). Leaders seek guidance from human resources managers to meet the challenge of transitioning to future generations to replace the loss of baby boomers (Teng, 2020). Many organizational leaders fail to prepare a succession planning strategy to reduce the risk of losing the knowledge, skills, and abilities retiring baby boomers possess (Chang & Besel, 2020). Human resources managers must function as the change agents to develop a succession plan to transition the workforce despite the shift in differences of each generation (Desarno et al., 2020). The challenges include skills inventory, leadership styles, morals, and core values (Ugoani, 2020). The influence of these challenges should be assessed to manage a successful transition from retiring baby boomers to future generations. Through

succession planning, human resources managers must ensure the organization retains its sustainability, economic, and competitive edge.

The focus of this study is to discover human resources managers' use of succession planning strategies to replace the retiring baby boomers from the workforce. The lack of succession planning strategies imposes challenges and obstacles that will guide the business forward in the future. These challenges could develop into ongoing conflict and the loss of knowledge of skilled workers (Tang & Martin, 2021). Succession planning strategies in the workforce are imperative to maintain success (Teng, 2020). Executive leaders and human resources managers alike are required to take the initiative to minimize this discourse. Human resources managers must update business practices to obtain the best talent to replace retiring baby boomers to achieve successful organizational change.

Problem Statement

Leaders face the loss of experience, knowledge, and skills because of the baby boomer generation retirement (Vilčiauskaitė et al., 2020). Fry (2020) reported that 28.6 million baby boomers in the third quarter of 2020 were retired, with an annual growth of two million yearly. The general business problem is that leaders fail to develop succession planning strategies to retain potential loss of knowledge, skills, and experience from retiring baby boomers. The specific business problem is that human resources managers lack succession planning strategies to manage the transition of knowledge possessed by the retiring baby boomers leaving the workforce.

Purpose Statement

The purpose of this qualitative, single case study was to discover succession planning strategies used by human resources managers to oversee the transition of experience, knowledge, and skills influenced by baby boomers. The target population consists of five human resources managers from organizations located in the southeast region of the United States who have successfully developed and implemented succession planning strategies when losing the retiring baby boomer effect from the workplace. The implication for positive social change includes the potential to apply and develop succession planning strategies for future generations to provide career advancement, social responsibility, and sustainability to ensure success in all environments. The information from this study may be converted into an educational tool to promote qualified individuals and increase knowledge and talent retention opportunities for future generations to continue success. Succession planning strategies also help develop great leaders to improve communities and surrounding environments.

Nature of the Study

Three research methods are qualitative, quantitative, and mixed-methods (Yin, 2018). The research method for this study is qualitative. Qualitative researchers use open-ended questions to discover what is currently happening or has occurred (Johnson et al., 2020). In contrast, quantitative researchers use close-ended questions to test hypotheses about variable relationships and group differences (Rudd et al., 2021). Mixed methods research includes both a qualitative and a quantitative component (Harrison et al., 2020). I did not test for a hypothesis because a case study was conducted. The qualitative

method was selected for this study because I intend to identify and explore successful succession planning strategies for retiring baby boomers.

I considered three qualitative research designs to identify and explore experience, skills, and knowledge transfer strategies from the baby boomer generation retiring from the workforce. The three qualitative research designs were case study, narrative, and ethnography. The research design suitable for this study was a case study. The case study design is an in-depth look using multiple data types and sources (Yin, 2018). Narrative designs entail studying the experiences of single individuals through personal life stories and exploring phenomena (Nigar, 2020). Ethnographic researchers collect data over long periods and focus on individual world concepts (Gertner et al., 2021). Ethnographers must engage themselves in a specific culture to provide a thorough view from the inside out. This view consists of customs, beliefs, cultures, and rules of the organization or grouping. The ethnographic design was not appropriate for the study because data collection is longer than the other methods requiring a constant return to the research site for additional data (Gherardi, 2019). Selecting the case study format for this study presented the best opportunity to portray my research and its results.

Research Question

What succession planning strategies prepare human resources managers to implement and manage the transition of experience, knowledge, and skills possessed by baby boomers retiring from the workforce?

Interview Questions

1. What was the necessity for developing succession planning strategies for the retiring baby boomers?

2. What best practices have your leaders applied to retain the knowledge, skills, and experience of retiring baby boomers?

3. What types of intrinsic and extrinsic incentives or bonuses are encouraged to implement succession planning?

4. What measurements are developed and implemented to ensure effective succession planning strategies?

5. How did you overcome barriers to implementing succession planning strategies for retiring baby boomers?

6. What succession planning strategies have been the least effective, and why?

7. What else would you like to share regarding succession planning strategies for retiring baby boomers that we have not discussed?

Conceptual Framework

The transformational leadership theory was introduced in early 1985 by Bernard Bass (Bass et al., 1987). The four aspects of transformational leadership are idealized influence, inspirational motivation, intellectual stimulation, and individualized consideration (Bass & Avolio, 1993). Transformational leaders may possess some qualities of transactional leaders and include elements of engagement, motivation, and creativity (Rajagani & Diwyaa, 2020). Transformational leadership is a motivational style in which leaders and their followers encourage one another. Transformational leaders

foster a better atmosphere for public dialogue resulting in effective succession planning strategies (Chang & Besel, 2021). Each leadership style determines significant differences in how leaders and followers operate (Purwanto et al., 2021). Transformational leadership strategies support a motivational effort to inspire others to reach their full potential.

Transformational leadership theory pushes current leadership to explore the uncharted territory of replacing the baby boomer population retiring from the workforce. Without plans and an organizational culture that envisions and employs transformational change, organizations are predisposed to fail (Chang & Besel, 2020). Applying transformational leadership seeks to change employees' interests to realizations, leading to concern for organizational success (Peng et al., 2021). The influence of transformational leadership theory is tied to an organization's sustainability and culture (Bakri & Abbas, 2020). Transformational leadership theory provides transparency to form a strong leadership team to replace the outgoing baby boomer leaders from future generations. The use of transformation leadership theory ensures the engagement of baby boomers and future generations to empower and train future generations to innovate and help shape an organization's future success.

Operational Definitions

Baby boomers: Baby boomers are the generation of individuals born between 1946 and 1964 (Dameria et al., 2022).

Baby boomer' effect: Baby boomers' effect is the influence that the generational cluster born between 1946 and 1964 has on the environment and society (Martin & Roberts, 2021).

Change agents: A change agent is a person who acts as a catalyst providing sufficient increased performance and training enhancements to ensure a specific change takes place to benefit the organization and its employees (Ghasabeh, 2021).

Generational theory: Generational theory is a theory that reflects the recurring age cohort that influences behavior patterns through generations in United States history (Wang, 2021).

Generation units: Generation units are classified by individual identification within the same demographics and similar values and cultures (Lyons et al., 2019).

Transformational leadership: Transformational leadership is a management system where the leader identifies the need for change and provides knowledge, skills, and abilities to change the scope of committed members (Purwanto et al., 2021).

Assumptions, Limitations, and Delimitations

Assumptions

The influence of perspectives a researcher may assume to be true is determined to be assumptions (Evans et al., 2021). The first assumption is that response would be honest and accurate from each participant. I assumed each participant was comfortable answering the questions because of nondisclosure. Another assumption is that the transition of retiring baby boomers resulted in a significant loss of knowledge, skills, and experience for the organization. The next assumption is that succession planning is necessary to have continued success in the organization. The final assumption is the time to conduct the study only required a short period of time.

Limitations

Limitations are potential constraints on a study beyond the researcher's control and could affect the study results (Ancker et al., 2022). A limitation of this study was conducting interviews with only human resources managers. Another limitation of this study was the proximity limited to organizations in the southeast region of the United States. The COVID-19 pandemic presented restrictions that may have hindered access to participants. The final limitation is the participants' results may differ based on gender, experiences, and length of employment.

Delimitations

Delimitations refer to restrictions in a study (Theofanidis & Fountouki, 2019). The first delimitation in this study is that participants were only human resources managers who experienced the phenomenon of baby boomers retiring and leaving the

workforce. Another delimitation of this study is the geographical location of participants was the southeast region, as it was the only location used for the study. The selection of retiring baby boomers is also a delimitation of this study. The silent generation, individuals born before 1945, was assumed to be out of the workforce and not considered.

Significance of the Study

Contribution to Business Practice

The significance of exploring succession planning strategies for baby boomers retiring from the workforce is to explore ideas of retaining experience, knowledge, and skills through effective leadership. Effective leadership sustains the vitality of an organization (Usman, 2020). Organizations will lose valuable, prominent baby boomer leaders with essential knowledge and skills. Knowledge retention from retiring baby boomers is vital to successors (Bano et al., 2022). Succession planning is fundamental to replacing baby boomers while meeting the needs of the continually changing environment in the workplace. Human resources managers could use the strategies to transition knowledge and leadership from the baby boomers to their successors. The findings from this case study may offer solutions and ideas on how to plan for transitions of positions left vacant by the baby boomer generation, increase knowledge management, and ensure strategies for future succession planning.

Implications for Social Change

Understanding the phenomenon of baby boomer retirement is valuable to fostering new leaders and career growth in an organization (Chaudhuri et al., 2022). The

findings from this study may assist human resources managers in discovering strategies to conduct succession planning efficiently and effectively for retiring baby boomers. The importance of succession planning strategies is to increase the knowledge and guiding principles of succession planning. The use of succession planning strategies in the workforce provides an environment that enhances training, professional development, and leadership skills for the successors of positions left by retiring baby boomers.

The discoveries generated from this study may contribute to social change as human resources managers develop new strategies to implement succession planning among the remaining generations. The outcome of these strategies could focus on pursuing knowledge transfer for future generations in the workforce. The development of succession planning strategies derived from this study will guide managers in integrating business principles with succession planning strategies to create successful organizations. The data collection process conducted for this study may provide insights that may influence policy, training, behaviors, and attitudes in succession planning strategies.

A Review of the Professional and Academic Literature

The objective of this qualitative case study was to investigate how human resources managers oversee the transition of experience, skills, and knowledge possessed by baby boomers. The purpose of the literature review was to provide research and documentation on succession planning strategies for organizations experiencing baby boomers' retirement. Walden University Library databases were the source of most of the resources used for this study. The databases used were ABI/Inform Global, Business Source, ProQuest Central, ScienceDirect, and Google Scholar. The literature includes

ninety percent of peer-reviewed articles related to transformational leadership, generational theory, knowledge management, human resources, and succession planning.

The literature review comprises an overview of the conceptual foundation, a critical analysis of topics associated with generations and succession planning, and a synthesis of literature related to the research. The discussion includes an analysis of theories and key themes. I retrieved 644 articles using business and management databases and 12 seminal books from the library catalog, which I further reviewed. Mostly 98% of the scholarly peer-reviewed journal articles cited in this section were published within the last five years.

Generational Theory

The understanding of generational theory helps determine the characteristics of each generation. Generational succession is connected to organizational change, which impacts succession planning (Magerelli et al., 2022). The founder of generational theory, Karl Mannheim, explained the theory centered on a social location where individuals experience events occurring during a specific time frame (Mannheim, 1970). Researchers applied generational theory to analyze the era an individual was born and exposed to a socio-historical phenomenon that influences one generation's scope (van Hoorn, 2019). The effect of that phenomenon affects an individual's values and morals. Each generational event has a lifelong influence on the quality of individual life (Lim & Leong, 2021). The effect of generational events fosters a generational characteristic. Generational characteristics eternally affect the beliefs, behaviors, lifestyles, and

standards of any generation. These influences can inflict upon an individual through a series of events that occur in a generation.

The creation of a generational series of events is done in two steps. The first step is the social location where the event occurs (Shaikh et al., 2021). The second step is the consciousness that arises from the experiences within that time frame (Shaikh et al., 2021). Mannheim's generational theory is usually applied to youth through young adults, who experience events and convert them into cognitive thinking (Dunham, 1998). The cognitive thinking of these individuals adjusts their mindset mentally and spiritually (Au, 2020). Events such as World War II, Vietnam War, and participation in Freedom Riders work to define individuals' thoughts, attitudes, and activities in each generation. Exposure to events like these brings about social change in a generation.

Mannheim's theory combines four elements of social change. The first element of social change is socialization. Socialization involves interacting with parents and their children (Boyle, 2021). The concept is that children easily share the concepts and ideas of their parents (Boyle, 2021). The insight that parents share with their children in their adolescent years is the early shaping of an individual's social being. Lyons et al. (2015) suggested that socialization at this age reflects the shaping of an individual and depends on the era when the event occurs in an individual's life. Testing the elements recalls that socialization is based on attitudes and values, but others recognize common identification in a generation (Dunham, 1998). The socialization results indicated that individuals of similar interests would embrace the possibility of social change to enhance their environment.

The next element in social change introduces new ideas, challenging what individuals know about their generational experience (Connolly, 2019). Introducing new ideas allows individuals to generate their cognitive thinking versus what they have come to know is true (Grasso et al., 2019). Examples of experiences are when individuals enroll in college, join the military, or start a new career (Dunham 1998). Experiences such as these allow shifts from the appropriated emphasis to reality and require an individual to choose a path regardless of whether there is an effect (Esposito & Mirone, 2019). These life-changing experiences develop the characters of individuals of each generation. The sociology of generations supports means for discovering the social divisions over time, including gender, through structural change and cultural alteration.

The subsequent development in Mannheim's generational theory, as discussed by Dunham (1998), results from the challenge of generational experience. Individuals decide which ideas work best for them and apply information accordingly. The knowledge from generational experiences creates a shift in individuals and helps them understand their thoughts, develop their values, and cultural beliefs (van Hoorn, 2019). Leaders invest and research these shifts to be open to communicating better and successfully transitioning their staff (Wang, 2021). Individuals learn about themselves and their surroundings and create generational units with people with similar ideas and feelings (Leslie et al., 2021). The formulation of generation units helps transform their values and beliefs into continuing practices. Organizational leaders try to understand transformation in generational units to incorporate social aspects into organizational culture.

The final element in generational theory is the continued practices of generational units using their forces of power to implement social change (Dunham, 1998). Generational units are classified by identifying the same demographics and similar values and cultures (Lyons et al., 2019). The generation units develop ideas, events, and mottos, which are key factors influencing their behavior and attitudes as a collective cohort (van Hoorn, 2019). The process and understanding of generational theory involve values and characteristics conducive to creating an intentional environment to generate new leaders. Integrating generational theory and succession planning is essential for organizational development, growth, and social change.

Social change encompasses a range of social and civic outcomes arising from increased awareness and understanding of society and the environment. The morals and values possessed by individuals adapt to socio-demographic trends, such as new development, economic growth, and knowledge wealth (Salamatov et al., 2021). Mannheim's generational theory provides researchers with essential elements to analyze generational cohorts. For this reason, renowned researchers William Strauss and Neil Howe took an interest in and expanded the theory in the early 1990s.

Strauss and Howe (1991) defined generational theory as a recurring period of cohorts called generations with similar values and beliefs that occurred during a specified period in United States history. Strauss and Howe's version of the generational theory repeats the four turnings in Mannheim's theory (Strauss & Howe, 1997). Turnings in generational theory develop unique personalities, beliefs, and values (Demidov, 2021). Each turning designates a phase in the cycle associated with a distinctive phenomenon in

each generation. The turnings are each defined by a series of events that affects a generation's views and perceptions.

The first turning is high, illustrating a new horizon of the era and the death of the old days. Individuals experiencing high turning are content with their future, although those who feel inferior or out of place are conflicted about the group's conformism (Strauss & Howe, 1997). The last high stage was the ending of World War II. The next turn is awakening which brings renewal and changes in thoughts and beliefs (Demidov, 2021). The final awakening stage arose within the civil rights revolution. During this time, individuals attempted to reclaim self-awareness and autonomy (Karashchuk et al., 2020). Each step of the turning depicts the happenings of an individual.

The next stage is unraveling, representing the breakdown of institutions and increased individual strength (Strauss & Howe, 1997). Shifting moods and changes occur, and individuals develop and mature during this cycle (Karashchuk et al., 2020). The final turning is the crisis, almost like a survival mode involving individuals working for the greater good to save their generation. These turnings reflect the history of growth, development, uncertainty, and destruction. The turnings unveil the formulation and experience of a generation. The turnings provide an understanding of how leaders can understand generations and use the knowledge to create succession planning.

Generations

Five active generations currently in the workforce are the silent generation, baby boomers, generation X, generation Y or millennials, and generation Z (Dimock, 2019). Each generation possesses different characteristics that desire different needs and wants.

The motivation and incentives that work for the baby boomer generation may not necessarily work for future generations. A goal in organizations is to manage a diversified workplace that works cohesively with the generations (Lyons et al., 2019). Leaders are now tasked with knowing how to operate with several generations in the workplace (Arslan et al., 2022). The neglect of omitting this task can be detrimental to an organization. Individuals from each generation reflect their perspectives in the workplace. Identifying each of these generations' characteristics is important to ensure organizational cohesiveness.

The first generation is the silent generation, which includes individuals born before 1945. The generation is often known by other names, such as the veteran, traditionalist, and World War II generation (Cote, 2019; Sanner-Stiehr & Vandermause, 2017). Silent generation life experiences were cultivated by such events as World War II and the Great Depression. The silent generation is the most loyal, ethical, and civic-minded of the generations (Cote, 2019). The silent generation members, unlike the others, value their work and position. The veterans' ideals and morals were molded by childhoods spent in the challenging times and personal sacrifices of the Great Depression and by service in the war (Sahrash, 2020). Sahrash (2020) suggested that the nucleus of the silent generation makes them the most valued generation in the workforce. The silent generation views their work as a distinct honor, such as a soldier who honors his country. Family life was more traditional, disciplined, and strict. Traditionalist employees follow the rules, according to Cote (2019). This generation often is less likely to cause conflict in the workplace as the silent generation has high respect for authority. Cote (2019) noted

that the silent generation values the security of family life. The silent generation endured a lot of turmoil. The characteristics of this generation strive for their determination to survive.

Baby boomers were born between 1946 through 1964 (Cote, 2019). The baby boomer generation is the largest and most widely recognized workforce (Juevesa & Castino, 2020). Baby boomers hold power, knowledge, and moral authority in most organizations (Sanner-Stiehr & Vandermause, 2017). The generation was marked by the Civil Rights Movement, women's liberation, the rise of television, and President Kennedy's assassination (Sahrash, 2020). These circumstances helped create the leaders of today. Baby boomers are very strong-willed, determined, and have a strong work ethic (Cox et al., 2019). Baby boomer generation engaging tactics also draw others to their qualities (Cote, 2019). Many researchers express that the knowledge lost due to members of this generation leaving the workforce could overwhelm an organization's leaders (Cote, 2019; Sanner-Stiehr & Vandermause, 2017; Schmidt & Muehlfed, 2017). The need for succession planning strategies to integrate knowledge from baby boomers back into organizations is a necessity. The surge of many baby boomers retiring from the workforce has leaders striving to find succession planning strategies to replace these workers.

Generation X, born in 1965-1980, has made strides in the workforce (Cote, 2019). These individuals are more self-reliant (Alkire et al., 2020). Generation X members are more inspired by life experiences than the previous two generations. Previous generations referred to them as lazy and non-sufficient (Yudhaputri et al., 2021). Generation X

members were often "latchkey" kids, as most had parents who both worked and spent considerable time at home alone (Freeman, 2022). These individuals were at the forefront of the digital age and were very attached to their handheld and wireless devices (Sirait & Purnama, 2022). Generation X workers often prefer a mentor or facilitator in the beginning stage of their career; however, they desire independence in the final stages of success (Cote, 2019). Currently, Generation X seeks and stays with flexible, results-driven organizations that adapt to their preferences. Leaders seek that many of its next leaders will be Generation X and Y.

Generation Y, or millennials, are more radical than previous generations (Sanner-Stiehr & Vandermause, 2017). This generation was born between 1981-2000 (Sanner-Stiehr & Vandermause, 2017). This cohort struggles a bit with previous generations in the workplace. Millennials sometimes enter the workplace as risk-takers with a sense of entitlement (Sanner-Stiehr & Vandermause, 2017). Millennials are multitaskers, confident, tech-savvy, and optimistic (Kaul, 2022). Generation Y members arrived on the job with higher expectations and were considered the most outspoken of the five generations. Millennials can notify thousands of their cohorts about which companies match or fall short of their ideals (Cote, 2019). Millennials will take on responsibilities and work hard to succeed, an attitude reminiscent of the fiercely competitive boomers. Millennials will possess the innovative spirit that leaders feel can move them to the next level of success.

Generation Z was born in 2000 to represent the new generation in the workplace (Demir & Sönmez, 2021). The members of Generation Z are moving quickly into the

workforce and are more determined than previous generations. Generation Z members, similar to Generation Y, like flexibility and independence (Gabrielova & Buchko, 2021). Generation Z members desire to make an overall change in the world and defy authority. Generation Z members are the best in technology (Thangavel et al., 2021). Generation Z members are still a vital upcoming group of leaders. Generation Z members poised themselves as engaging and intellectual leaders prepared to employ new strategies to embrace the future world of work.

Theorists have different perspectives on the transformation of generational theory. Understanding each generation is imperative to transforming an organization and its leadership (van Hoorn, 2019). Leaders put years into building an influential culture and brand. Understanding generational shifts are essential to empowering an individual to lead the organization and retain its competitive advantage (Wang, 2021). The internal and external forces and cultural differences will differ with each generation. The effect of these values and belief systems leading to differences will reflect in reaction authority, work customs, and job satisfaction (Parry & Urwin 2017). Organizations may value a learning culture and encourage this with training, mentorship, and job shadowing (Smith & Garriety, 2020). The application of these practices can inspire generations. With the COVID-19 crisis, transformation leadership among generations is encouraged to ensure collaboration and gain insight into best knowledge practices in training, coaching, and opportunities (Urick, 2020). A contributing factor to ensuring these practices are successful is engaging each generation. Transformational leadership serves as the

conceptual framework of this study because of its prevalent use to transition from one generation to another.

Transformational Leadership Theory

Burns (1978) is the originator of transformational leadership theory, later enhanced by Bass and Avolio (1993). The creation of strong leadership is a practical part of organizational culture. Transformational leadership theory is a leadership style that involves the leader engaging the interest of their followers to achieve a common goal (Bass & Avolio, 1993). The art of transformation is to bring forth positive effects and desired results. Transformational leadership may possess some qualities of transactional leadership, but it will also include signs of commitment, inspiration, and innovation (Purwanto et al., 2021). The use of transformational leadership influences the needs of followers to benefit the organization. The leadership style usually leads by example. Transformational leadership is the oldest and most well-known theory and applies to organizations past and present.

Transformational leadership theory fits into succession planning strategies. The connection of transformational leadership focuses on offering consistent assistance to provide more than the expectation and creating a feasible pathway for succession planning (Chang & Besel, 2021). Applying the four elements of transformational leadership motivates current leaders to focus on the two dimensions of succession planning, which are leader and career development (Mehreen & Ali., 2022). The growing acknowledgment of the crucial role of leaders in organizations indicates a higher priority on the development of future generation leaders (Armugam et al., 2019). The practice of

transformational leadership theory reinforces the engagement of retiring baby boomers and future generations to create successful future leaders. Applying transformational leadership theory in succession planning strategies will provide human resources managers with the appropriate training to close the knowledge gap between retiring baby boomers and future generation leaders.

Bass and Avolio (1993) refined Burns's theory through different components to revolutionize Burns's (1978) theory. Bass and Avolio's (1993) transformational leadership theory is comprised of four elements: (a) individualized consideration, (b) inspirational motivation, (c) idealized influence, and (d) intellectual stimulation (Mansor et al., 2017). The elements in this leadership style are not featuring the historical success path in leadership previously set by outgoing baby boomers. Human resources managers seek new leadership to transform and enforce successful succession planning strategies (Armugam et al., 2019). Transformational leadership encompasses four elements to highlight individual and organizational performance. The application of each element reflects the usage and change of transformational leadership in organizations.

The first element of the transformational leadership style is individualized consideration. Individualized consideration is considering individuals' thoughts and ideas and helping them reach their goals (Azizah et al., 2021). Leaders motivate individuals and engage employees to feel empowered and innovative (Ashfaq et al., 2021). The influence and inspiration from leaders will heighten individual skills and abilities and provide intrinsic emotions in aspiring followers to develop new ideas for promotion. As retiring baby boomers train and influence future generations for future replacement,

applying the symmetry and synchronization of this change will require characteristics that will stimulate its course (Hassan et al., 2017). As a characteristic of transformational leadership theory, individualized consideration shows empathy for individual needs, which should be considered when designing a succession plan.

Transformational leaders possess an inspirational motivation to encourage the best in their successors. The second element in transformational leadership theory provides intrinsic and extrinsic rewards to inspire the motivation of its successors. Motivating leadership in followers can inspire the leadership style to match each individual (Mansor et al., 2017). Leaders with this inspirational motivation build relationships and bridge gaps to create cohesiveness in organizational culture (Bakker et al., 2022). Leaders are interested in finding the full potential of followers to ensure they reach their highest level of performance (Ashfaq et al., 2021). Highly motivating leaders show concern for the individual and their progression. Matching the needs of their followers and the organization's needs is the responsibility of a transformational leader (Pattnaik & Sahoo, 2021). Recognizing an individual's potential and characteristics motivates them to attain the next level, creating influential leaders for future placement.

Idealized influence is the third element in the transformational leadership theory. As an authentic leader, knowing where one stands on moral and professional issues is inflexible virtue (Gebczynski & Kutsyuruba, 2022). Individuals emulate the authenticity of leaders because of their values and morals (Hendrikz & Engelbrecht, 2019). These leaders usually have standards of ethical conduct and are socially responsible. When leaders inspire followers to act on their vision and aspirations, it gives the work meaning

(Bakker et al., 2022). Followers respect and trust leaders who show strength and courage. Possessing positive characteristics is helpful in the succession planning process when influencing the next set of leaders to fulfill retiring baby boomers' placement.

Intellectual stimulation is the challenge of encouraging individuals to think outside the box for new thoughts and ideas (Gebczynski & Kutsyuruba, 2022). This process of intellectual stimulation allows decision-makers to get creative in solving problems. Leaders with this characteristic respond to uncertainty by depending greatly on intuition, educated guessing, and premonitions, which leave considerable room for error. Transformational leaders encourage and provoke high morals and values in their followers (Hassan et al., 2017). Optimizing an individual's ability to reach new heights and achieve goals supports followers and increases their ability to evolve into great leaders (Ashfaq et al., 2021). The stimulation of intellect that leaders inspire in their followers gives persistence and makes a meaningful improvement in moving the organization forward. The use of intellect stimulation in leaders creates the possibility of innovation and independence of the follower to become autonomous.

Leaders engage their followers by investing in their ability to succeed and supporting innovation, growth, and creativity (Lee et al., 2020). An advantage in developing succession planning strategies is replacing old leaders with new leaders who express fresh ideas and spontaneity (Mattar, 2020). Many other leadership theories may crossover with the conceptual framework for this study. The following leadership approaches have been used to conduct succession planning. Exploring the following

principles reveals relevance to the placement of retiring baby boomers and succession planning.

Transactional Leadership Theory

Transactional leadership is managed through various transactions using reward and power to influence followers' service (Saeed & Mughal, 2019). Transactional leadership is straightforward. The concept of transactional leadership is ensuring the rules and procedures are executed regardless of results (Jensen et al., 2019). The transactional leadership style reflects negatively on change and has little flexibility. The value of practicing transactional leadership is based on efficiency and being goal-oriented (Wang et al., 2021). Transactional leadership is not conducive to innovative and creative organizations. Transactional leaders value organization and structure. Transactional leaders set up various tasks and award their followers once it occurs. Transactional leaders focus on present issues, whereas transformational leadership focuses on the future issues of an organization.

Contingency Leadership Theory

Fred Fiedler (1964) introduced the contingency leadership theory. Contingency leader theory is the process of understanding leadership conditions in varying situations. Contingency leadership theory does not ignore the principles and values of leaders regardless of the leader's success (Changar & Atan, 2021). Fiedler thought that personality plays a small part in the role of a leader. The contingency leadership theory has no best practices for operating an organization. The contingency theory of leadership analyzes how situational factors affect behavior and leadership style (Shala et al., 2021).

The assumption of the behavior or form of leaders is automatic. This leadership style depends upon a model with no guarantees of success (Zigarmi & Roberts, 2017). The dependency on success is based on the circumstances. The contingency principle proposes optimism and supports the concept that almost everyone will become a successful leader and learn to navigate crises (Subri et al., 2020). Contingency leadership theory relies on placing the right leaders in the right situations. A contingency theory leadership style may adapt to succession planning but does not create a space for new ideas to flourish.

Situational Leadership Theory

Situational leadership theory success is based on when leaders adjust their style to their followers' willingness (Woods, 2019). Developed in 1969 by Paul Hersey and Ken Blanchard, situational leadership theory is based on four tasks and is relationship oriented (Zigarmi & Roberts, 2017). The situational leadership theory model is ranked from high to low in tasks and relationship commitment. The first behavior is delegating, which refers to low-task and low relationship in the situational leadership theory model, allowing followers to make task decisions. The second behavior is participating with a low task and high relationship behavior that accentuates shared ideas. The high task and relationship style is considered selling in this leadership form. A situational leader explains task directions in a supportive and influential way. The final task is telling behavior which is a high task and low relationship in this model. Leaders in this stage give orders and supervise their execution. Walls (2019) stated that leaders with these characteristics are often flexible. The use of situational leadership theory in succession

planning indicates competence and commitment. Leaders who identify with situational leadership theory are adaptable and support collaboration.

Knowledge Management

Knowledge management is indispensable to the process of succession planning. The management and transfer of knowledge at the workplace is an approach to employee interaction to acquire knowledge in an organization (Bano et al., 2020). Knowledge management is the systematic acquisition and identification of explicit and tacit knowledge shared in an organization for redistribution among other parties (Umar et al., 2021). The groundwork begins with capturing the knowledge and ends with flexibility. Leaders' failure to create succession plans with the retirement of baby boomers from the workforce could result in a costly loss to the organization (van Zyl et al., 2017). Leaders should collaborate and develop a plan regarding the retiring baby boomers' exit and archiving valuable information before leaving.

Lam et al. (2021) considered knowledge management a rule in organizational excellence. The initial stage of knowledge management determines the gathering of pertinent and beneficial information that baby boomers maintain. The phenomenon of retiring baby boomers has left organizations unprepared for their departure (Troger, 2021). The baby boomer generation is the most highly skilled aging workforce in United States history (Sprinkle et al., 2018). Baby boomers occupy most of the workforce's senior level positions (Bano et al., 2020). This loss of information and talent cannot go unnoticed in organizations. The loss of the baby boomer generation can affect the performance level of an organization.

Regardless of friction and workplace inadequacies caused by generational differences, the exit of baby boomers will leave a burden on executive leadership (Sumbal et al., 2017). The widening gap could result in losing business intelligence, intellectual capital, and profits (Taylor, 2018). Navigating this loss will take strategy, time, and dedication for leaders to develop a plan to offset conflict crises. Many organizational leaders are concerned about mitigating knowledge management losses from baby boomer retirement (Myers, 2020). Losses such as resignation and mortality can leave an organization at a shortfall if knowledge management issues remain unresolved (Acosta et al., 2020). Creating a knowledge management system can help avoid damage to an infrastructure of an organization. Applying a knowledge management system is practical to ensure knowledge is retained within an organization.

Leaders need to define a process to extract, retrieve, and store the knowledge, skills, and abilities retiring baby boomers possess. The succession planning method is considered a complex blueprint for knowledge management (Bano et al., 2020). Leaders must ensure that completing this task is exciting and rewarding (van Zyl et al., 2017). Leaders need to construct a model that encourages knowledge management and transfer that retains crucial information from retiring baby boomers who have dominated the workforce over the last two decades (Arslan et al., 2022). The replacements include the upcoming generations that are more tech-savvy and desire feedback (Taylor, 2018). Internal recruitment allows leaders to begin sourcing their replacements for baby boomers. Internal recruitment is an initial starting point in the future growth of succession planning for outgoing baby boomers.

The recommendation for knowledge management strategies is to implement the rationales by engaging baby boomers and future generations (Ali et al., 2022). Leaders must select resources such as mentoring, questionnaires, or surveys to gather information from baby boomers to facilitate the progression of the organization. Using data from these tools can sustain a competitive advantage over others in the same industry. Managers must successfully convey this content to others (Rupčić, 2018). Leaders should create a collaborative team to implement knowledge management strategies. The value of knowledge sharing can have a significant effect on future generations.

Leaders need to secure preventative measures to avoid the loss of knowledgeable information. The rapid departure of baby boomers has organizations developing databases to retain information (Millar et al., 2017). Leaders attempt to avoid loss of knowledge by creating database knowledge solutions to establish a sustainable experience system to secure information, knowledge, and methods. Obtaining other knowledge can be done through actual hands-on experience. Schmidt and Muehlfeld (2017) contended that leaders must create learning spaces that enrich the knowledge sharing process. The knowledge sharing process prevents future generations from repeating past failures and using knowledge, skills, and abilities to improve or enhance future productivity.

The engagement of baby boomers with future generations will develop a bridge to encourage the interaction of knowledge building. Ideally, collaboration can promote a feeling of camaraderie among baby boomers and future generations. Engaging team-building of multiple generations in the workplace may avoid conflicts, bottlenecks, and

knowledge transfer across generations (Waal et al., 2017). Formal and informal exchanges can often lead to opportunities for verbal or hands-on knowledge sharing across generations (Naim & Lenka, 2017). The influence of the loss of baby boomer knowledge could result in a vast deficit of intellectual capital. Leaders and human resources professionals must establish practical knowledge-sharing principles and practices to help build a knowledge management network.

Millar et al. (2017) stated knowledge management for future generations would require a wide use of technology. The increase in social media and online communities has made accessing knowledge easier. Baby boomers are somewhat reluctant to use technology (Millar et al., 2017). Future generations, mainly generation X and millennials, will be the givers of knowledge regarding social media and technology. Baby boomer retirees have a virtual place to go and enter insights they may recall after leaving the company. Baby boomer retirees feel a sense of loyalty to their respective organizations. Retiring baby boomers often feel committed to supporting the organization long after leaving (Sumbal et al., 2020). The mentorship that baby boomers offer to organizational members is essential to provide senior level support to new successors. The intellectual capital gained from mentoring retiring baby boomers to their successors is invaluable to leaders.

Knowledge management should be a continuous process in an organization's culture. When leaders invest in the development of future generations, the rewards are great. Knowledge management focuses on investing in people by prioritizing learning and training. Professional development through education and training creates value

through hard work, aptitudes, experiences, and internal motivations (Schmidt & Muehlfeld, 2017). Organizational leaders strive to preserve their operational efficiency and competitive edge to secure collective knowledge and make it accessible to up-and-coming generations. Implementing knowledge management is essential to the success of the organization (Sadq et al., 2020). Failure to address the need for knowledge management can significantly lose productivity, efficiency, and revenue. Successors struggle to meet the demand without the benefit of decades of knowledge being shared. Knowledge management is necessary to ensure succession planning strategies are efficient and effective.

Knowledge Transfer

The knowledge gap created by retiring baby boomers is immense, but it does not have to be unfavorable. The failure of organizational leaders who do not plan for the generational shift will result in significant losses such as competitive edge, consumers, and investors (Sumbal et al., 2020). Knowledge retention from the baby boomer generation is associated with organizational success (Klenke, 2018; Sumbal et al., 2017). Knowledge transfer is necessary to establish, generate, retain, and allocate knowledge and ensure its accessibility for future users (Rupčić, 2018). Knowledge transfer provides gateways to problem-solving. The transfer of knowledge will also spear innovative ideas.

Knowledge transfer is a practical initiative that is imperative in implementing succession planning. Establishing the mission, vision, and values sets the standards for organizational strategies (Rupčić, 2018). An organization's leaders are committed to capturing and transferring valuable knowledge within its ever-changing workforce

demographics (Schmidt & Muehlfeld, 2017). Baby boomers are retiring, and managers need to create a strategy to preserve the knowledge to share it with their successors in the organization. The process of environmental scanning activities informs managers of ecological change, which

is then interpreted by managers and induces their response in strategic adaptation (Borges & Janissek-Muniz, 2018). Managers need to be visionaries to incorporate the strategic plans of the organization. Managers must staff the right employees with the knowledge, skills, and abilities to achieve the vision and mission of an organization (Sprinkle & Urick, 2018). Millar et al. (2017) reiterated that new knowledge remains innovative and creates a competitive edge. Knowledge transfer and management promote and emphasize an innovative culture. The importance of knowledge transfer in succession planning recognizes those who possess valuable knowledge before departure.

Leaders recruit knowledgeable individuals to maintain sustainability and competitive advantage. Knowledge transfer strategies are valuable for creating new ideas to reduce and improve a job function (Lenart-Gansiniec, 2022). Knowledge transfer strategies will increase productivity while reducing overhead costs (Sprinkle & Urick 2018). Investment in knowledge management systems creates work environments that support shared knowledge and learning the culture that builds the value of their employees (Azeem et al., 2021). In creating such an innovative learning space, leaders must know how to retain skilled workers to remain competitive. Experienced employees can be costly to maintain. The cost of the knowledge is valuable, and the system retention's profit value should be no problem.

Understanding the importance of knowledge transfer requires an appreciation of organizational knowledge and expertise experience (Hillman & Werner, 2017). Cross-functional training and experience-based learning are essential strategies to keep employees fulfilled (Torraco & Lundgren, 2020). The focus for organizations is to guide businesses to help them establish or improve talent acquisition. The goal of using training and development is to enhance business value and credibility. Training and development as a succession planning tool have evolved into expansive growth and performance of individual capabilities.

The workforce stretches across five different generations. Managing talent for different generations present a strong need for managing talent in the workplace. Talent management, also known as human capital management, is the process of recruiting, managing, assessing, developing, and preserving an organization's most important resource, its people (Naim & Lenka, 2017; van Zyl et al., 2017). The initiative of talent management is to employ and engage employees and retain them at all costs, if possible. Talent management is a significant component of human resources. Leaders have addressed the issue of attracting and retaining talent at all levels. The diverse needs of each generation make it challenging to manage them in the workplace. Aguinis & Burgi-Tian (2021) stated that talent management success identifies the needs and does not ignore the concept. Managers must define whether talent management should be human-oriented or organization-oriented. Bass's transformational leadership theory expands on finding the perfect fit for the organization (Bonsu & Twum-Danso, 2018). Knowledge transfer is crucial when conducting work that is creative and innovative. When

organizational leaders adopt the transformation leadership style, knowledge transfer is highly encouraged for new idea generation and the formulation of talent management.

Talent Management

Human resources manager's description of talent management is the strategic renewal of human capital (Jarvi & Khoreva, 2020). Talent management members have the opportunity to create a dynamic workforce that empowers employees and shareholders. The main challenge is attracting, motivating, and retaining the best talent for the organization. The objective for organizations is to develop adequate and appropriate plans and put in efforts to attract the best pool of available candidates and nurture and retain current employees (Naim & Lenka, 2018). Talent management encompasses the knowledge, skills, and abilities needed to fill the gaps and improve in other areas. Talent management is a method to accomplish activities and support human capital development.

Talent management practices are beneficial to an organization. Matching human capital to the current and future needs of the organization defines the relevance of talent management. Aligning the right candidate to the proper position is valuable to an organization's need for success (Bonsu & Twum-Danso, 2018). When filling vacant positions formerly occupied by baby boomers, selecting a suitable candidate is necessary. The skills, knowledge, experience, and personal characteristics are just a few components reviewed to choose the best potential candidate (Raheem & Khan, 2019). Human resources managers aim to find different approaches to attracting the best talent. Effectively selecting candidates for positions optimizes the talent available and helps

regulate the availability of such talent (Raheem & Khan, 2019). The replacement of retiring baby boomers must be strategic to ensure continued success and organization sustainability.

Retention is also significant to the success of talent management. Retaining qualified employees increases value for the organization and shareholders. Tamunomiebi & Okwakpam (2019) addressed retention as a culture. The process of retention goes beyond just offering benefits and compensation. The strategic objective of retention is to preserve employees for future opportunities despite challenges from the opposition and labor demand (Lysenko & Yaroshenko, 2020). Offering options and respect to employees to provide their ideas and share them with the organization is a bonus to pursue achievement and success. Opportunities are imperative to retain qualified employees for growth and leadership. Through employee optimization, leaders create a culture to increase retention (Hultman, 2020). Failure to retain skilled employees hurts the organization's bottom line. Managing the organization's talent and ensuring retention should be a part of an organization's strategy.

Managing talent has become a challenging task within the workforce. The workforce demographics include several generations that possess various skills and resources to benefit any organization. Leaders committed to capturing and transferring knowledge among ever-changing workforce demographics can retain knowledge and improve their workforce (Raheem & Khan, 2019). Creating a plan that appeals to a multigeneration workforce has its difficulties. The approach to managing talent in a multigeneration workforce is to meet the needs and wants of each generation (Kostanek

& Khoreva, 2018). Leaders use talent mobility to manage talent transition among a multigeneration workforce (Mishra, 2018). The transition of retiring baby boomers through the upward movement of talent benefits any organization. Talent mobility has enabled leaders to replace baby boomers effectively and create space for future generations.

Most new hires are generation Y, employed by generation X and baby boomers, which could become a looming conflict if diverse needs are not addressed. Another dilemma is the difficulty of developing potential leaders. As baby boomers prepare for retirement, the pool of generation X is not as large and lacks the pipeline needed to fill these roles. The lack of talent in future generations makes it difficult to transfer knowledge from retiring baby boomers. Rajagani & Diwyaa (2020) exemplified how organizations are starting to identify their need for strong leaders. The values, beliefs, and attitudes influence each generation (Mannheim, 1970). The leadership schema that leads to influential leaders is not to examine what leaders desire but what followers expect from leadership (Salvosa & Hechanova, 2020). Effective leadership that can handle multiple generations is a strategic plus for organizations. Organizations with strong leaders have developed an adaptive capacity to ensure a culture that includes generations of diversity.

Strong leaders have a competitive advantage. Individual development must be connected to the organization's expansion to increase an organizational leader's capability and create added value (Rajagani & Diwyaa, 2020). Another focus of talent management is to create a talented, ethical culture. An organization's atmosphere should reflect

positive ethical behavior. Building a talent pool in an ethical culture minimizes conflict and creates a rewarding environment that employees will appreciate. Ethical leaders are viewed as the hallmark of organizational model behaviors (Lu et al., 2019). Effective leadership is essential to managing and motivating talent to perform in an organization. Leaders who create a culture of diversity, inclusion, and innovation will prevail strongly in succession planning for the next generation.

Succession Planning

Many leaders develop succession planning strategies to overcome the surge of baby boomers leaving the workforce. Succession planning is a continuous plan to replace tenured and valuable employees (LeCounte et al., 2017). The benefits of succession planning include providing leadership continuity, reducing turnover, increasing retention of key personnel, and directly or indirectly improving business and financial results (Tamunomiebi & Okwakpam, 2019). The elements of succession planning are precarious and must connect with the mission of the organization. The development of succession planning is created and approved by executive leaders, but the human resources department handles the execution of the plan.

Human resources professionals must decide whether to develop or invest in recruiting new talent. The mission, vision, and strategic plan are core elements of a succession plan (Ballaro & Polk, 2017). Human resources managers' responsibilities are to engage current employees and invest in the future generation of the organization (Chang & Besel, 2020). Human resources management builds fiscal capacity and fosters a culture of confidence and appreciation in an organization (Al Suwaidi et al., 2020).

Leaders base their talent selection on the need and the competition they possess. Technical positions may be recruited from outside the organization since the candidates' talent coincides with their skills. However, recruitment might use internal talent that possesses specific characteristics that may present untapped potential talent. Technological advances such as SAP, Succession Wizard, and UltiPro software have created opportunities for human resources professionals to take the concept of replacing retiring baby boomers to the next level for succession planning.

Technological advances use presents an interactive and significant factor in succession planning. Organizations have databases that include the knowledge, skills, and abilities to link individuals to succession planning. Cavanaugh (2017) outlined the crucial and potential failure of not linking succession planning with human resources and the organization's strategy. Technology assists in forecasting and processing recruitment and succession proposals (Johnson et al., 2018). Succession planning meets the organization's needs by implementing its strategy effectively (Gandhi & Kumar, 2014). Succession planning is the process of people, technology, and strategy. Leaders must ensure these three dynamics work together to achieve the overall goal.

During succession planning, several goals are set in the development stage. First, successful organizations demonstrate that leadership and sound succession practices can directly affect and strengthen leadership (LeCounte et al., 2017). The main task is identifying what talent is needed to supply the workforce. Succession planning strategies help communicate plans to staff and update them as needed (Tamunomiebi & Okwakpam, 2019). Organizations' executive managers research which department could

benefit and use the additional talent needed to operate at maximum production at the lowest cost. Human resources managers incorporate learning, motivation, and development to encourage future talent. Succession planning strategies include learning theories that inspire prospective candidates to increase knowledge and skills among the talent that can develop into future leaders.

Learning theory, also known as reinforcement theory, emphasizes that people are motivated to perform or avoid certain behaviors because of past outcomes that have resulted from those behaviors (Cote, 2019). The learning theory allows learners to acquire knowledge, change behavior, or modify skills. The application of the learning theory is determining what the learner finds most positive or negative. Sprinkle and Urick (2018) suggested making learning interpersonal when incorporating knowledge across generations. Through personal experience and observing others' experiences, future generations consciousness through training (Lyons et al., 2019). The effectiveness of training depends on the delivery to provide the reinforcement. Learning organizations leaders encourage development through shared information, culture, and leadership, stressing the importance of individual learning and increasing motivation.

Motivation theories are used to understand what inspires a person to pursue goals and opportunities. Managers need to identify what strengths and weaknesses of these individuals to encourage employees to be efficient and effective. According to Close and Martins (2020), generational research reflects that each generation requires different motivation techniques. Leaders increasingly engage administrative personnel in the leadership expansion process that adds unique value to building the leadership pipeline

beyond management development specialists, consultants, academics, or other professionals (Johnson & Parnell, 2017). Management and human resources specialists seek different motivation approaches, such as intrinsic and extrinsic awards, to ensure retaining talent and meeting organizational goals (Valickas & Jakštaitė, 2017). Empowering employees through intrinsic and extrinsic rewards motivates them to be independent in decisions personally and professionally. The use of motivation theories supports the collaboration of generations and organizations to thrive.

The foundation of organizations seeking overall success is through their talent. Human resources professionals ensure that the organization continually has knowledgeable and top tier employees (Rao, 2017). The most valuable technique to meet this responsibility is to conduct successful succession planning. Employees leave their jobs either on a planned or unplanned basis. Effective succession planning provides a route to establishing precise and synchronized leadership flows (Fusarelli et al., 2018). The power of an organization lies within its talent, and the more robust the talent pool, the organization benefits (Chang & Besal, 2020). Demographic trends indicate insufficient next-generation leaders to replace retiring baby boomers in organizations. The lack of available workers to replace the retiring baby boomers increases the need for succession management.

The Role of Human Resources in Succession Planning

Human resources management leaders develop, attract, and maintain a talented organization. The role of human resources management in succession planning has become more vital than in previous generations. The baby boomer retirement has been

the most significant shift in power in organizations (Johnson & Parnell, 2017). Executive leadership and human resources managers deem succession planning tedious and only practiced by large corporations and businesses. The connection between organizational performance and human resources management is based on the viewpoint of human resources (Alhamad et al., 2022). Ballaro and Polk (2017) stated human resources managers act as a catalyst between talent and organizational leaders. Human resources managers operating as the intermediary are needed to ensure the succession of one generation replacing the next generation in any organization. Succession planning can be beneficial for organizations, large and small, to create a successful transition in any organization.

Human resources managers may not initiate or create a succession plan. The human resources department members uphold a strategic role in implementing succession plans. The role of human resources managers in succession planning is essential in advancing and executing effective strategic planning of an organization (Monyei et al., 2021). Ali et al. (2019) argued organizations become more competitive by adopting a plan that identifies job skills, knowledge, abilities, and relationships and transitions them to future generations to develop smooth progression in succession planning. The support, investment, and efforts to ensure the significance of a succession plan for retiring baby boomers are strongly encouraged. Human resources managers depict a pivotal role in this demographic shift and how it affects the entire workforce.

The developmental stage of succession planning is tedious and essential in the process. The development of the succession planning process can last from 1 to 3 years.

(Reis et al., 2021). Adapting demographics to future generations and talent scarcity is a vast challenge for human resources managers. Human resources managers must understand the challenges and opportunities that baby boomers' retirement represents (Leider et al., 2018). Leaders who understand that people are the main element in executing their objectives will benefit from succession planning practices (Sohu et al., 2020). Human resources managers addressing these two issues ensure future viability for organizations. Building a surplus of talent and adapting to demographic changes can be a competitive advantage. Incorporating this as an ongoing initiative will offset organizations' unawareness of demographic shifts.

Human resources managers' role in succession planning is a trend best identified through knowledge of applicable concepts and practices from past to present. Morrissey & Johnson (2017) outlined why human resources professionals are concerned about retiring baby boomers. Human resource professionals must know the skills gap and training needed to assist with the multi-generational workforce succession. Ballaro and Polk (2017) emphasized that focusing on these two elements will articulate the plan to select and retain the right people. Converting crucial skill sets and competencies for viable positions yields the added value of determining the organization's labor replacement needs (Johnson et al., 2018). Targeted programs such as behavior, cognitive, soft, and hard skills training should be included in succession planning to develop the future generations to replace these skills that will eventually leave with the baby boomers.

The human resources department is a functional unit within an organization that represents the investment in human capital. Human resources managers must assess when to buy, build, or borrow talent in their succession strategy. Human resources leaders whose talent management strategies are effective can value the advantage of talent retention, recruiting costs reduction, and leadership replacement (Johnson et al., 2018). Tamunomiebi and Okwakpam (2019) encouraged implementing succession planning to address motivating factors conducive to retaining talent. Although leaders know that no one is indispensable, replacing baby boomers is costly and time-consuming. Succession planning mitigates the effects of a sudden or unanticipated vacancy and retains the possibility of a replacement.

Values and ethics are valuable assets to successors who are taking the place of retiring baby boomers. Leaders develop moral and ethical codes to ensure commitment to safety, awareness, and inclusion. Wilson (2018) suggested succession planning is effective when safeguarding values and ethics. The human resources department oversees two roles beyond structuring and modeling ethics in succession planning (Lu et al., 2019). The first role is to manage changes, such as succession planning to ensure ethical values are established and accepted. The second is to create a culture of openness, creating a safe space for individuals to develop capabilities and organizational commitment support.

The responsibility of providing training and development is assigned to the human resources division. Human resources leaders employ training and development to assist employees by learning and enhancing skills. Wilson (2018) accentuated that

training empowers employees and should be a part of effective succession planning. In contrast, Ballaro and Polk (2017) stated that enhancing current talent is more important than training. The development of employees should include such practices as lateral moves, a special projects team with leadership roles, and internal and external training. Implementing procedures like this helps human resources professionals to identify individuals who can replace retiring baby boomers and create a talent pool for the unexpected. The use of performance management in succession is required to assess efficiency in succession planning.

Human resources managers focus on performance management, leadership development, and staffing. Performance management identifies the efficiency and effectiveness of the implementation of organizational goals. Human resources managers identify the drivers or barriers to an organization's succession planning strategies (Monyei et al., 2021). Performance management has become increasingly needed because the incoming generations are flexible and interchangeable with careers. Sohu et al. (2020) stated performance management has a significant and positive outcome on succession planning. Human resources management consists of selecting performance management programs that reflect the value and importance of building organizational opportunities and strengths. Participation in these programs will show skillsets in employees or internal talent creation. The formation of performance management can generate success highlights, build credibility, and accord (Vajda, 2019). Human resources leaders aim to create performance management systems that align with the organization's

business standards. The effectiveness of performance management is essential to support the decisions made in succession planning.

Human resources managers create professional development programs to manage their human capital. Succession planning, workforce retention, new hires, and knowledge transfer have become functionaries of the human resources department. The members of the human resources department comply with training and development and fulfill compliance standards (Ali & Mehreen, 2019). The human resources department members' commitment, mentorship, and job rotation are essential for preparing succession planning and organization processes (Sohu et al., 2020). Such utilization means involvement with senior leadership to recognize the potential to take on greater responsibility and accountability to supply positions as they become vacant (Chang & Besel, 2020). The role of human resources in succession planning is to be the designer and catalyst for the strategy. The monitoring and evaluation of succession planning strategies gauge the strategy's success after implementation is a necessary human resource function.

Theory of Succession Planning

The underlying belief of succession planning is identifying and developing replacement talent already in the organization and acquiring new talent (Tamunomiebi & Okwakpam, 2019). The groundwork of succession planning ensures a smooth transition of outgoing talent and replaces it with qualified applicants (Tamunomiebi & Okwakpam, 2019). The scarcity in the workforce with the most extensive outgoing skills of baby boomers has been referenced as a challenge for organizations requiring qualified

employees (Sumbal et al., 2020). Leaders create transitional and developmental programs to customize their talent to merge into viable positions baby boomers leave. Developing a succession plan of this magnitude requires several components to move forward successfully.

Succession planning is the accountability of senior management and an organization board members, who must devote time and effort to safeguard its effect is understood within the organization. Tamunomiebi & Okwakpam (2019) stated that the critical part of succession planning in an organization is ensuring the right talent successfully replaces the outgoing talent. The objective of succession planning is the foundation of continued long-term success in an organization (Ali et al., 2019). The first component to pursue is translating the business strategy into a talent strategy to ensure it is relevant and produces tangible benefits for the organization. The second component is to ensure commitment and involvement from the senior leaders in the organization (Ali et al., 2019). Senior leaders involvement provides support and a level of importance to improve the plan. The next step is to create a process of talent recognition, assessment, and development (Rao, 2017). When researching succession planning, creating a flexible design leaves room for improvement and changes along the way (Ballaro & Polk, 2017). The human resources department members are not present in the initial development of succession planning. Human resources department members focus on ensuring accountability in the implementation stage.

Leaders can benefit from the philosophies of detecting job skills, expertise, social interactions, and organizational practices and transitioning them onto the next generation

of workers, ensuring the smooth passage of talent. Succession planning is used to preserve organizational knowledge (Asbell et al., 2017). Recognizing talent, identifying growth potential, and tracking growth through assessment are three of the most significant issues in succession planning (Jindal & Shaikh, 2020). The challenges associated with preserving organizational knowledge are a small pool of candidates, skill shortage, and reduction in training and development. These issues validate the need for current action to move the organization forward. Developing a succession planning strategy as a recurring task will normalize change and save time and money (LeCounte et al., 2017). Succession planning can be fundamental to closing the gap as a result of losing the baby boomer population. The convergence of the organization's significant needs and the employees' interests can occur in succession planning through various hands on or virtual platform training processes.

Significant shifts in the population's scope, structure, and geographic distribution dramatically alter the social, economic, and political institutions, generating challenges and opportunities along the way (Johnson & Parnell, 2017). The vacancies are becoming fewer, and talent has become sparse with the push of entrepreneurship (Rao, 2017). The availability of candidates is not readily obtainable (Ali et al., 2019). A generational shift in an organization reflects fewer young workers willing to commit to the normality of the commonplace workforce as in previous generations (Johnson & Parnell, 2017). The generational experience shift has caused a valuable look into organizations' daily operations and the need to reassess their long-term goals (Sprinkle & Urick, 2018). Older seasoned workers are staying in the workforce longer than they originally planned. The

new graduates are finding it harder to seek workforce placement. Current employees are apprehensive about their current positions, and senior leadership focuses on cutting costs.

Succession planning has its strengths, weakness, opportunities, and challenges. Succession planning involves either the advantages of planning or consequences if the organization fails to comply with changes (Ali & Mehreen, 2019). A succession management strategy must contain a model to distinguish and create new leaders to formulate continuity and retain knowledge (Ali & Mehreen, 2019). Johnson et al. (2018) mentioned four succession planning themes that provide examples of corrective action and new initiatives. According to the authors, the key to successful succession planning requires execution based on planning to avoid the unexpected loss of valuable employees (Johnson et al., 2018). Change agents must understand the constraints of succession planning to overcome them. Recognizing the challenges within succession planning is imperative to ensure that leaders successfully implement strategies.

The constraints for succession planning in organizations begin with warning of a mass loss of the baby boomers retiring and leaving the workforce. Several rationales explain the labor loss and the need for organizations to develop plans to replace such a substantial generational loss. The research conducted in many career fields suggests workers are now past retirement age, with some organizations expecting a 50% attrition rate in the next few years (Fusarelli et al., 2018). Millennials and generation Z workers are made more complicated by the number of individuals forgoing careers in senior leadership with the push for entrepreneurship (Fusarelli et al., 2018). Leaders must

address potential pitfalls to avoid losing talent. Maintaining an organization's mission and values ensures to oversee its main element, its people.

The retiring baby-boomer generation from the workforce and succession planning strategies to replace them created challenges to sustaining a positive organizational culture (Kosterlitz & Lewis, 2017). Baby boomers are maintaining their careers long past the traditional retirement age. Succession management aims to facilitate a network by which tacit knowledge is possessed from one individual to the incoming candidate (Klenke, 2018). Communication is essential for the success of strategies, including succession planning. The innovation of a culture of intergenerational communication entails a culture of reciprocal trust and dedication, which encourages the flow of knowledge, skills, and abilities within the organization.

Transition

In Section 1 of this study, I focused on the foundation of the study and discussed the problem, purpose, research question, method, and design, and the academic literature that supports the importance of the research. Section 2 includes my role as the researcher. This section consists of participants, research method, research design, population sampling, ethical research, data collection instruments, data collection techniques, data organization techniques, data analysis, and the reliability and validity of the study. The information in Section 2 supports the reasoning and justification for the specifics regarding my research on succession planning strategies for retiring baby boomers.

The strategies from this study may assist with current and future organizational succession planning for the retirement of future generations. The qualitative research

method is an explanatory design that will precisely depict the succession planning practices within any organization. The participants and the data collection process will sustain a complete analysis of the problems facing organizations and the strategies required to maintain them in the future. In Section 3 of this study, the findings of this study are presented. An explanation of an overview of the study, the results, the application for professional practice, the implications for social change, the recommendations for action, and further analysis of strategies for succession planning for retiring baby boomers.

Section 2: The Project

Section 2 includes a description of the outline I followed to explore the strategies for succession planning of retiring baby boomers through qualitative research design. I discuss my role as the researcher and the identification and recruitment of participants, including interview techniques. Further details include explaining the qualitative research method and case study design. Section 2 includes articulating the specific strategies for data collection, data analysis, reliability, and validity.

Purpose Statement

The purpose of this qualitative, single case study was to discover succession planning strategies used by human resources managers to oversee the transition of experience, knowledge, and skills influenced by baby boomers. The target population consisted of five human resources managers from organizations located in the southeast region of the United States who have successfully developed and implemented succession planning strategies when losing the retiring baby boomer effect from the workplace. The implication for positive social change includes the potential to apply and develop succession planning strategies for future generations to provide career advancement, social responsibility, and sustainability to ensure success in all environments. The information from this study may be converted into an educational tool to promote qualified individuals and increase knowledge and talent retention opportunities for future generations to continue success. Succession planning strategies also help develop great leaders to improve communities and surrounding environments.

Role of the Researcher

The role of the researcher in qualitative research is to collect, evaluate, and clarify data in research. The results of this study do not include personal feelings, experiences, principles, ideas, and views (Yin, 2018). The researcher's goal is to actively listen to their participants and document their experiences. Qualitative researchers strive for comprehension from the perspective of their participants (Muzari et al., 2022). The explanatory nature of the qualitative research method permits the researcher to derive understanding from participants by employing inquisitiveness, open-mindedness, compassion, and suppleness. Gathering information by actively listening to participants narrating their experiences in their natural settings helps to identify how their practices and behaviors are shaped by the context of their environment (Muzari et al., 2022). As the researcher, I collected data from human resources managers who have successfully applied succession planning strategies to replace the outgoing baby boomer generation. I selected the case study design because the design's interview qualities supported my goal to extrapolate participant perceptions of the research topic.

As a qualitative researcher, I influenced the research process by avoiding bias and judgment to strengthen and add value to my study. Qualitative research involves an interpretative and naturalistic approach to any subject matter (Ezer & Aksut, 2021). The reliability and validity of the research design must justify the researcher's role in the research process (Yin, 2018). When navigating the research for this qualitative case study, my role needed to be empathic and distant. The influence of my research requires transparency about my perspective. My connection with baby boomers retiring from the

workforce made me realize that human resources managers lack strategies, which led to an empathetic position and furthered my desire to understand the phenomenon.

Researchers must adhere to ethical standards and guidelines when conducting research (Yin, 2018). The Belmont Report protocol is a requirement for the researcher to assist with ethical research standards. The Belmont Report enforces respect for persons, beneficence, and justice in the research of human subjects (Earl, 2020). Adhering to the principles of the Belmont Report means I brought no harm. As a researcher, I ensured Institutional Review Board (IRB) standards were followed to minimize risk and protect participants' rights. The interview process and data collection were explained in the consent letter. The main elements of this qualitative research expressed credibility, dependability, and transferability.

The primary data source of the collection is semistructured interviews. The interview consisted of open-ended questions to obtain information about the participants' experiences and perceptions. The standard for collecting most data with qualitative study is through interviews, which permit the researcher to understand the phenomenon from the person's perspective (Levitt et al., 2021). Interviews could not be conducted face-to-face because of the COVID-19 global pandemic. Generalizing data from semistructured interviews adds to qualitative credibility and trustworthiness. Semistructured interviews allowed me to be creative and conduct the interviews as simple conversations. The protocol for my interviews was detailed and reassured quality standards.

As the researcher, I mitigated bias to the best of my ability. The interview protocol provided guidance that separated my views as a researcher and distinguished

those of the participants. Griffin et al. (2020) advised qualitative researchers about becoming susceptible to researcher bias that could alter the information obtained during interviews. I had no personal or professional relationship with the participants and organizations included in this study. The researcher's responsibility is to mitigate bias by documenting what the participants have disclosed about their experiences and validation procedures and observing their practices (Raghavan et al., 2020). After completing interviews, checking, and analyzing the data, the data were transferred to an electronic format and stored on an encrypted universal serial bus (USB). The data and encrypted USB is held for 5 years and then destroyed to protect the integrity of the informed consent process.

Participants

The participants for this study were five human resources managers from the southeast region of the United States. The purposeful sample consisted of five human resources managers who have experienced the phenomenon of retiring baby boomers leaving the workforce and creating succession plans to replace them. Recruiting and retaining participants in the study is challenging for research efficiency (Blatch-Jones et al., 2020). The selection of the appropriate sample size supports the credibility of the study's data analysis (Kyngäs et al., 2020). The participants were selected based on their knowledge, skills, and abilities to create succession planning strategies to rectify the replacement of baby boomers leaving the workforce. The relationship between a researcher and participant is essential (Yin, 2018). The researcher employs ethical

procedures to cultivate and maintain connections with the participants through candor and association.

Case study research incorporates a strategy of inquiry that delves into the phenomenon presented by participants (Schoepf & Klimow, 2022). The participant selection was purposive sampling which meets the criterion per the participation invitation (Appendix A). The choice of using purposive sampling indicates the intentional selection of research participants to enhance data sources for answering the research question (Johnson et al., 2020). The selected participants were knowledgeable individuals who could fully answer the research questions and reflect on the occurrence of the phenomenon. A significant aspect of qualitative research quality is the selection criteria used to recruit participants for a study (Stenfors et al., 2020). The sample size is not predetermined. The interviews reached completion of information results at an ending point of data saturation.

Recruiting strategies for participants require approaching, recognizing, and acquiring consent to participate. Participant recruitment for research involves several activities, including obtaining eligible participants, vetting them, describing the research study, and providing motivation or incentives throughout the research process (Langer et al., 2021). Participants provided data to help answer the central research question. Participants can answer more elaborately and in detail. As the researcher, having the opportunity to respond immediately to what participants say by tailoring subsequent questions to information the participant has provided was essential.

Research Method and Design

Research Method

A study's methodology guides the researcher's strategic tasks when conducting research (Dunwoodie et al., 2022). The method a researcher selects depends on the goals, purpose of the study, and chosen research design and typically represents a trade-off between the ideal and real. Developing a plan challenges a researcher to consider a multitude of factors that influence the integrity of the study designed. The most appropriate research design for this study is the qualitative research design. Schoepf and Klimow (2021) described the qualitative approach to research that facilitates exploring a phenomenon within its data analysis. Qualitative research has its challenges. Qualitative research does not provide guidelines that could give the researcher a sense of comfortability and security in obtaining data (Roberts, 2020). I needed to adhere to the approved IRB guidelines for this research to ensure credibility and validity in my study.

The method chosen for this study is the qualitative method with a single case study. Yin (2018) suggested qualitative methodology is preferred to explore a population such as generations. Guar and Kumar (2018) indicated the demand for effective and straightforward strategies for evaluating content analysis studies. As the researcher, I conducted five interviews with human resources managers to collect data. The data collected were examined to connect the relationship between the data and the conceptual framework of transformational leadership theory (Ravindran, 2019). The qualitative research method assumes an active and open reality. The application of the qualitative approach provided an understanding of the participants reactions from their perspectives.

Qualitative research design is open-ended research about phenomena through interviews with participants (Leko et al., 2021). Qualitative methods allow the fullness of personal experience by providing in-depth data in the phenomenon's natural language. Data classification is allowed by observing the experience in its standard setting, rejecting preconceived notions, and using judgment (McGrath et al., 2019). The qualitative research method is flexible and allows the researcher to be entrenched in the investigation (Rutberg & Bouikidis, 2018). The selection of the qualitative approach assisted with developing my research question and determining how interviews would be conducted. Qualitative research is the most appropriate way to present the study in a naturalistic approach to the subject matter.

Quantitative methodology requires a statistical approach. The quantitative research method is formal, unbiased, and numerical for producing and refining knowledge for problem-solving (Mohajan, 2020). Quantitative and mixed methods test hypotheses that will not be pertinent to my research. Quantitative researchers seek a specific solution, often detected from closed-end questioning (Jain, 2021). A large dataset will have to be used for the researcher to use the quantitative method (Goertzen, 2017). Within the qualitative approach, I am concerned about human behavior toward a phenomenon. Using the quantitative method will not allow for this as it concerns uncovering facts about the phenomenon.

With a mixed method design, the process allows the ability to build on the conceptual framework of transformational leadership through the participants' richness of data. Mixed methods research is a research design with philosophical expectations and

inquiry. As a methodology, it is a mixture of qualitative and quantitative approaches throughout the research process (Gibson, 2017). As a method, the use of both approaches simultaneously is generally complex. Its main principle is that quantitative and qualitative approaches provide better insight into research problems than either approach alone (Basias & Pollalis, 2018). Mixed methods can be used to improve the validity of the research (Fusch et al., 2018). Mixed methods were not appropriate for this study, as it did not require a combination of both approaches. The complexity of using mixed methods was not appropriate to present this topic of strategies for succession planning of retiring baby boomers.

Research Design

A case study is in-depth exploratory research with an understanding of participants, events, behaviors, and feelings in a natural life setting. Case study research has grown in reputation as a practical methodology for investigating and understanding complex issues in real-world settings (Yin, 2018). Case study designs are used across several disciplines, particularly the social sciences, education, business, law, and health, to address a wide range of research questions. Over the years, the case study approach has evolved by applying various methodological approaches and development. Transformation and improvement have stemmed from similar influences from historical research methods and individual researchers' predictions, viewpoints, and understanding of case study research (Harrison et al., 2017). Researchers who have contributed to the development of case study research come from diverse disciplines, and their philosophical underpinnings have created variety and diversity in the approaches used.

The advantage of using case study research is the descriptive analysis presented to understand the how and why of an occurrence (Ridder, 2017). Data collection and analysis happen concurrently (Moser & Korstjens, 2018). Case studies generally apply several data collection methods, including observation and interview. Case study research is exploratory in nature. The possibility does not exist to generalize about the broader social situation directly from the findings of a single case study (Ridder, 2017). Case studies, as developed within the analysis, would typically study the actions of human behavior. New information can emerge that characterizes the experience of the phenomenon.

Case study design is the most appropriate for this study, as it allowed me to build on my conceptual framework through the participants' richness of data. The qualitative research method permits the researcher to discover the interrelated dynamics, information, and associations of these experiences and exemplify their social contexts (Shufutinsky, 2020). After IRB's approval to collect data, I sought solutions to address a chronic business problem. Interview methods range from highly structured for dependability or entirely open-ended to allowing boundless cooperation from participants to express responses (Johnson et al., 2020). Data were collected until I reached full data saturation. The NVivo12® analytical tool was used to analyze the data collected in the semistructured interviews.

The selection of the qualitative method assisted in the development of my research question and facilitated how interviews would be conducted. There are four ways to conduct qualitative research: (a) phenomenological, (b) narrative, (c)

ethnography, and (d) case study (Mohajan, 2018). Phenomenology design was not appropriate as it required a significant amount of time, requiring a larger pool of participants. Narrative design was not chosen, as multiple participants were selected. I rejected the ethnographic method as phenomenology would require extended time and a return to the data collection site. After reviewing qualitative method designs, I determined that a case study was the most appropriate approach.

Population and Sampling

The selection of sampling for this study is purposive sampling. Purposeful sampling is commonly used in qualitative research to navigate an abundance of data to the phenomenon of interest (Campbell et al., 2020). A purposeful sampling of five human resources managers who have experienced the research phenomenon was selected for this study. Sampling methods aim to amplify efficiency and validity, regardless of the research method used (Rose & Johnson, 2020). Purposive sampling increases the chances of observing phenomena in research. The goal of purposeful sampling is to emphasize the attributes of a population and generate viable answers to research questions.

Ethical Research

Qualitative researchers focus their research on exploring, evaluating, and portraying people and their natural surroundings. Proper research ensures that ethical principles are met. The ethical principles of autonomy, beneficence, and justice serve as guides for researchers to address initial and ongoing pressures between the demands and goals of the research and the rights of participants (Ludwig et al., 2021). I managed the ethical principles through the use of informed consent. The use of my interview protocol

(See Appendix C) and coding outline to protect the participants by adhering to ethical practices. Participants were given the autonomy to think and make decisions freely. As the researcher, ensuring beneficence means that participants suffered any harm from participation in the study. Participants served justice with equitable treatment, and no partiality was shown (Korstjens & Moser, 2018). Walden University IRB provides guidelines to protect the participants of the research. The priorities of research are to generate knowledge and meet ethical standards.

The principle of conducting research ethically and morally is essential in a qualitative study. When preparing for the interview process, the protection of participants is safeguarded from anything that can skew the study results (Reid et al., 2018). Participant privacy confirms that data collection was not influenced by fears of retaliation from an administration (Reid et al., 2018). The participation of participants is strictly voluntary and confidential. Addressing ethical matters in research is significant because of the study process's complexity (Dehghani, 2020). The relationship and familiarity between the researcher and participants in qualitative studies can form various ethical concerns, such as respect for privacy, honesty, open exchanges, and avoiding misrepresentations. Appropriate planning should be in place before the commencement of the research, and it must be evident how the study should be conducted and what level of association development is necessary.

The process of gaining consent from participants was threefold (Boydell et al., 2021). The participants consented voluntarily (see Appendix A). There were no incentives for participants. Each participant fully understood what was required of them

and their competency to complete the study requirements. The interview protocol detailed the interview process from beginning to end (see Appendix C). The roles throughout the research need to be identified and well-defined through guidelines and protocol (Twining et al., 2017). Information was obtained from each participant with consent before interview scheduling. The participants were granted free will to decide whether to participate or decline (Reid et al., 2018). The anonymity and confidentiality were preserved and imperative to the research. Coding was used to protect the participants' identities. Gaining the trust and support of the participants confirms the researcher reflects equal share and fairness to all (Lorenzetti et al., 2022). As the researcher, I ensured the protection of the participants during the data collection process. The principle of conducting research ethically and morally is essential in a qualitative study. Researchers must set the standard and protocols to ensure ethical research is done effectively.

Data Collection Instruments

I am the primary researcher of this study. Researchers in qualitative studies' primary objective is to be attentive, document, and track participants' answers (Arifin, 2018). I am unable to conduct face-to-face interviews because of the COVID-19 pandemic. I conducted virtual interviews via Zoom by asking seven open-ended questions to participants regarding their perspective on succession planning strategies regarding retiring baby boomers and recommended methods to ensure their replacement.

The data collection instrument I am using to perform this research is semistructured interviews. Proof of validity and reliability are required to verify the

integrity and superiority of a measurement instrument. Incentives were not provided for participants. The consent form and interview protocol are located in Appendix A and B. The consent form was sent through email, and the participant responded to the email with their decision to consent.

Semistructured interviews are designed to create a dialogue between the researcher and interviewer. Collecting data through semistructured interviews has demonstrated versatility and flexibility (Hwang et al., 2022). As a novice researcher, the goal of conducting these interviews is to be relational, intriguing, and skilled (DeJonckheere & Vaughn, 2019). Semistructured interviews are more useful as they allow for more rich and objective data and comparisons between other knowledgeable groups (Van de Wiel, 2017). The semistructured interview instrument format included a series of seven questions derived from previous research. The primary focus of the interview detailed views of perceptions and behaviors of the participants experiencing the phenomenon of baby boomers retiring and the goal to replace them with knowledgeable talent.

Throughout the interviews, I established reliability and validity throughout the study. Reliability and validity in qualitative research are the centerpieces of any subject being researched with scientific rigor (Reid et al., 2018). Ensuring access to scientific rigor and reflecting trustworthiness as the researcher, I demonstrated creditability, dependability, applicability, and comfortability (DeJonckheere & Vaughn, 2019; Reid et al., 2018). Establishing rapport with the participants permitted a connection between the study participants and me (Hawkins, 2018). The verification of data provided through the

interviews was completed through member checking, which increases the study's

credibility and conformability as a standard of rigor (Johnson et al., 2020).

Methodological triangulation adds depth to the data collection (Fusch et al., 2018).

Triangulation of the data enhanced the credibility of the study and added value. I adhered

to the Walden doctoral study rubric and research handbook guidelines to ensure that the

study meets the standards and is free of objections. The trustworthiness of a study is an

encounter in the three-phase preparation, organization, and reporting phase (McGrath et

al., 2019). Data obtained through the collection process is organized and analyzed to

ensure the presentation of the findings. Participants were safeguarded throughout the data

collection process from beginning to end through the participation invite (See Appendix

A), consent form (see Appendix B), and interview protocol.

Data Collection Technique

A data collection technique in qualitative research would initially be a structured

face-to-face interview at a location agreed upon by the researcher and participants (Yin,

2018). The global COVID-19 pandemic and the norms of conducting qualitative research

in a structured face-to-face interview are discouraged. The disadvantage of not

conducting face-to-face interviews is investigating the topic in-depth with the participant

and experiencing the facial expressions of the participant responses (McGrath et al.,

2019). The opportunity to observe the participants 'nonverbal cues and other impressions

is a disadvantage (McGrath et al., 2019). The first data collection technique involved

using a virtual platform such as Google Meet, Microsoft Teams, or Zoom to conduct

face-to-face interviews. The alternative will be phone interviews using an iPhone 7 plus and an iPad 9th generation to record interviews. The alternative was not used in this study.

Planning for the data collection ensures I follow proper interview protocol when conducting participant interviews. After receiving approval from IRB, invitations were sent to potential participants to request participation in my study. A draft of the letter was included in the appendix (see Appendix A). Qualitative data collection explores a phenomenon, underlining its processes, behaviors, and actions (Mukumbang et al., 2020). Conducting research activities helps minimize ambiguity and vagueness and improves data collection and access to participant expertise in the phenomena (Nowell et al., 2017). Incentives were not offered however, each participant received gratitude for participating. The data collection process ensures a researcher follows proper interview protocol when conducting participant interviews.

The invitation was posted on several LinkedIn groups or social media outlets. Performing screening of participants was conducted as it is a criterion of purposive sampling. An email invitation and consent form was sent to each participant (see Appendix A). Interviews were performed according to the interview protocol (see Appendix C). The data collected from the participants was verified through member checking, which certifies the reliability and trustworthiness of the data (McGrath et al., 2019). Each participant was sent a summarized review of their interview to ensure the accuracy of the data. Participants were given approximately seven days to respond with feedback. Conducting research and data analysis determined the performed interviews'

complexity, value, and richness (Mukumbang et al., 2020). Once participants confirm data for accuracy, identified, categorize, and coded the data.

The plan for collecting data is met with rigor and patience for a quality study. Data collection requires thorough planning, hard work, patience, perseverance, and more to complete the assignment successfully (Mukumbang et al., 2020; Yin, 2018). Data collected was sent to participants to ensure the accuracy of the information they provided in the interview. Profound and perceptive interactions with the data are prerequisites for qualitative data interpretation (Maher et al., 2018). The security of data collection must be established to ensure safe storage (Surmiak, 2018). The data received in interviews were coordinated through a password protected flash drive.

Data Organization Technique

Data organization consists of data received from semistructured interviews and arranged through coding and transcribing the information. As a researcher, it is vital to protect and preserve the confidentiality of the participants and the information received from the interviews. The data was arranged during interviews through a password protected flash drive. The tracking of data was discretely labeled for each participant. Notebooks were used throughout the interview to reference field notes of observation from participants. Field notes about the study assist researchers with understanding participants' lives and contextualized the responses to the phenomenon of interest (Phillipi & Lauderdale, 2018). Note-taking during the interviews effectively highlighted significant details and was used to present the study findings. Coding and labeling are

highly encouraged in qualitative research to protect participants and data (Williams & Moser, 2019).

The analytical tool I chose to use for my study is NVivo12® software. The software facilitates coding the data into themes for further analysis. The themes are categorized using a case classification to provide demographic specifics. Data assimilation was filed appropriately and labeled. The data was labeled employing the deductive approach. Repetitive phrases throughout the interviews developed the themes generated from the data. Data from the interviews and notes were coded under each related theme to conduct thematic analysis. For example, one of the themes from the data collected was effective succession. Basic terms such as leadership, mentors, and training were coded and were related to the associated theme. Each participant was identified with a code for participant protection. Microsoft Word was used to label files according to coded data. Gathering data from the recording devices and converting them to an electronic location such as Microsoft Word and Excel is encouraged for thematic analysis (Nina et al., 2020). Coding entailed of numbers and letters. Each dataset aligned with each participant. The use of unique coding in data organization expresses confidentiality and safety for participants (Pathiranage et al., 2020). The use of filing and labeling using the Microsoft suite provides better visualization and coding (Alvarez, 2020). I was in possession of exclusive access to data, and after collection, I will destroy data accumulated five years after research completion. Upon completing interviews, member checking, and analyzing the data, I transferred it to an electronic format and stored it on an encrypted USB. I stored the data on an encrypted USB for five years and then

destroyed the encrypted USB drive to protect the integrity of the informed consent process.

Data Analysis

Data analysis is the process of systematically applying analytical techniques to describe, illustrate, and evaluate data. According to Yin (2018), data analysis illustrates inductive inferences from data. Qualitative data analysis is an intricate process that demands reading, reasoning, and expression on the researcher's part (Ravindran, 2019). The data presents a narrative format of any possible alternatives. Data analysis in qualitative research is when data are continuously gathered and analyzed simultaneously (Nowell et al., 2017). Researchers examine patterns in observations throughout the entire data collection phase. Data analysis in qualitative research design is iterative (Ravindran, 2019). Data analysis in a case study allows the researcher to explore links between the data. The data is coded, and themes are developed to answer the research questions.

The objective of analyzing data is to obtain usable and valuable information. Whether the data is qualitative or quantitative, the analysis may provide and summarize the data. The identification of relationships and variables and identify the difference between them. Confirming data integrity is the precise and appropriate analysis of research findings. Qualitative research aims to understand the big picture using the data to describe the phenomenon (Aspers & Corte, 2019). The conceptual framework for this study is transformational leadership theory. Transformational leadership is the concept and idea of the plan for the research (Varpio et al., 2020). The data analysis process characterized common themes and translated them into a conceptual framework. Through

triangulation, data defined any issues or developed new knowledge requiring further clarification. The qualitative and quantitative analysis involves coding the data to identify similarities and differences.

Data analysis relies on inductive reasoning processes to understand and form the connotations stemming from data (Lester et al., 2020). Developing the interview schedule and analyzing the interview data was completed with care and consideration. Triangulation enhances the depth of data collected. The depth of data collected supports triangulation and saturation (Fusch et al., 2018). The use of triangulation to analyze data provides integrity to a research study.

There are four triangulation types: (a) data triangulation, (b) theoretical triangulation, (c) researcher triangulation, and (d) methodological triangulation (Valencia, 2022). The method of triangulation used in this study is methodological. Methodological triangulation is most applied by researchers (Knight et al., 2022). The methodological approach uses multiple methods to acquire data specific to a phenomenon (Valencia, 2022). As the researcher, I promoted a complete understanding of the phenomenon surrounding the strategies for succession planning for retiring baby boomers. Data collected in the interviews research produced related themes and patterns to reflect succession planning strategies for retiring baby boomers.

I used TranscribeMe software to transcribe my interviews. TranscribeMe is a compatible service that conveniently creates data transcripts and delivers them back into the NVivo12® software. Eneanya et al. (2020) stated that using TranscribeME software to transcribe the audio recordings successfully and effectively analyzed data in

NVivo12®. I chose this transcription software because of its convenience in conducting my research efficiently and effectively. TranscribeMe ensures confidentiality when performing transcription services (Nilo, 2018). Using TranscribeMe software was not time consuming and was essential for presenting my data in Section 3. After completing data collection, I proceeded to the qualitative analysis software NVivo12®.

The NVivo12® software allows the management and categorization of data collected (Phillips & Lu, 2018). Exporting data into the NVivo12® software assisted me with creating themes and results. The exportation process was simple and easy as the transcription service provided a specific template to use for the program. Thematic analysis can be used to detect, examine, organize, define, and inform themes discovered in datasets (Nowell et al., 2017). I concluded with thematic analysis, which explores themes and patterns resulting from the evaluation of the data. The flexibility of thematic analysis provided rich yet complex data that can be modified in several ways (Nowell et al., 2017). Thematic analysis granted me to summarize the similarities and differences between the data. I chose NVivo12® compared to other qualitative data analysis software, such as Atlas IT, to avoid the time required for other qualitative analysis software. As the researcher, it allowed me control of the data analysis process. NVivo12® also compatible with TranscribeME.

Reliability and Validity

Reliability

Reliability refers to consistency in a method of measurement (Rose & Johnson, 2020). The measurement is deemed reliable if the same result can be consistently

obtained using similar methods under equivalent circumstances. Reliability answers whether the instrument consistently measures what it is intended to measure. The trustworthiness of data collection demonstrates support for the researcher's argument (Elo et al., 2014). The accumulation of data keeps the circumstances as consistent as possible to reduce external factors that might vary the results (Rose & Johnson, 2020). The protocol for interviews safeguards the reliability of the study if the researcher follows it throughout the data collection process (See Appendix C). The alignment of interview questions with the research question and the protection of confidential information enhances the reliability of a study (Nowell et al., 2017). Trustworthiness and accuracy are critical parts of establishing reliability in a study. Credibility was completed through member checking and triangulation, which is crucial for establishing trustworthiness.

Validity

Validity is defined as paramount availability approximation to the truth of a given proposition, inference, or conclusion (Brown et al., 2017). The four types of validity are (a) content, (b) construct, (c) face, and (d) criterion. Construct validity is designed to question whether the research can generalize the constructs. The differences in validity, and the many lists of specific threats, provide a useful scheme for assessing the quality of research conclusions (Rose & Johnson, 2018). Validity is general in scope, applicability, and well-articulated in its philosophical suppositions.

Establishing validity can present challenges. The researcher must ensure credibility, confirmability, dependability, and transferability. External criticism

establishes validity, whereas internal criticism establishes reliability (Mohajan, 2018).

Validity in qualitative research indicates conformity and credibility regarding

occurrences associated with the phenomenon, as signified by the study results explored in

the research (Hayashi et al., 2019). Validity and reliability enhance clarity and reduce

occasions of inserting researcher bias in research. The study validity is based on the

ability to maintain neutrality and trustworthiness (Roller, 2019). Qualitative research is

an inductive process. The researcher generally explores understanding and perceptions of

a given phenomenon. As the primary data instrument for this study, I ensured my results

reflected valid and believable results.

Validity in qualitative research addresses three aspects which include: (a)

proposition, (b) inference, and (c) conclusion in research (Rainer, 2017). Ensuring

through triangulation that member checking is identified and described accurately

supports the credibility of my study. Dependability is exhibited through the stability of

the data over time and under different circumstances (Roller, 2019). The process of

dependability in this study is reflected in the data saturation process. Transferability in

the study is how future researchers will apply data results (Tuval-Mashiach, 2021). The

conformability of results means that the data precisely represent the evidence that the

participants supplied, and the explanations of those data are not invented by the

researcher (Brown et al., 2017). Establishing validity is important to support the

contribution the scientific method offers to knowledge advancement. The foundational

aspects of this study may be applied to future research projects related to implementing

succession planning practices within any organization.

Transition and Summary

In Section 1, I focused on the foundation of the study, the problem, purpose, research question, method, and design, and the academic literature that supports the importance of the research. Section 2 includes a discussion of my role as the researcher conducting this research. This section also consists of the role of the participants, research method, research design, population sampling, ethical research, data collection instruments, data collection techniques, data organization techniques, data analysis, and the reliability and validity of the study. In Section 3, I explain the analysis of the interview responses from the participants and the emergent themes to answer the research question. In addition, a synopsis of the application for professional practice, the implication for social change, and recommendation for future research.

Section 3: Application to Professional Practice and Implications for Change

Introduction

The purpose of this qualitative single case study was to explore the succession planning strategies human resources managers implement to replace retiring baby boomers. The data came from interviews with human resources managers who have successfully implemented succession planning strategies for retiring baby boomers. The findings showed methods that human resources managers used to implement succession planning strategies to manage the transition of experience, knowledge, and skills possessed by baby boomers retiring from the workforce.

Presentation of the Findings

The overarching central research question was: What succession planning strategies do human resources managers implement to manage the transition of experience, knowledge, and skills possessed by baby boomers retiring from the workforce? The participants in this study were five human resources managers within large organizations. Each participant was in the southeast region of the United States and has successfully implemented succession planning in an organization to replace baby boomers retiring. Each participant was knowledgeable about the topic and had over ten years of experience as a human resources manager. Each participant has been categorized as P1, P2, P3, P4, and P5 (See Figure 1). Participants provided data through semi structured interviews and note taking from the research. The data provided through the interviews and note taking generated four themes. The four themes are the need to implement succession planning for retiring baby boomers, effective succession planning

strategies, human resources' role in succession planning, and the importance of

knowledge transfer in succession planning.

Figure 1

Participant Graph

Participants	Participant Description
P1	Human resources director with over 25 years of experience oversees a large facility in Alabama. Over 14 years of experience with succession planning. Succession strategies most used leadership programs
P2	Personnel Director over a large government municipality in Florida. Over 15 years of experience in human resources and succession planning. Succession strategies used leadership programs and cross training.
P3	Human resource manager over a large healthcare facility in South Carolina. Over 10 years of succession planning experience. Oversee succession planning strategies such as Leadership training. Also, implement many cross-training opportunities.
P4	Human resources manager over an educational facility in Tennessee and over 20 years of succession planning and human resources expertise. Sponsor mentoring programing and incorporate cross training.
P5	Human resources manager and professor supervise a prominent South Carolina government municipality. Over 25 years of experience in human resources, succession planning, compensation, and benefits. Sponsor mentoring programs as the most used succession strategy.

Theme 1: Implementation of Succession Planning

The implementation of succession planning requires preparation, planning, and development (See Figure 2). Theme 1 is the evidence collected for research questions 1, 2, and 3. Each participant expressed the need to implement succession planning for retiring baby boomers. P1, P3, and P5 stated that the organization reflected a need for succession planning for the retiring baby boomers and merging in the new generation of leaders. P2 and P4 generate annual reports of all eligible employees for retirement, including the baby boomer generation born between 1946 and 1964. Most of these individuals hold senior-level positions in the organization with years of knowledge, skills, and abilities that are valuable to an organization. Organization and human resources leaders must confirm they are prepared to implement succession planning for their retiring baby boomers.

Preparation is an important phase in the implementation process. The preparation stage of identifying the positions in organizations held by retiring baby boomers is vital to implementing succession strategy planning. All participants 1-5 emphasized the importance of being prepared to implement a successful succession planning strategy. P1 and P2 stated that outlining the expectations of the succession planning process prepares leaders and successors for the opportunities both sides can gain from experience. P4 explained how the preparation in succession planning proactive start avoids shortcomings in staffing. Succession planning ensures a smooth transition between outgoing baby boomer leaders and new successors. The task of preparation can be tedious but rewarding when plans are in place and properly executed.

As human resources managers prepare to transition baby boomer leaders to new successors, it must be determined which leadership position is most critical and vulnerable. Leaders prioritize succession plans due to labor changes and increasing retirements (Johnson et al., 2018). A general assessment of the mission, vision, and clear objectives must be set to ensure which positions are prioritized (Wonnia, 2021). The alignment of the succession plan and business strategy must flow together for effective results (Obianuju et al., 2021). P2 indicates when reports are generated, it provides a visual aid to foresee what may be lost from retiring baby boomers and what is to gain with future successors. Succession planning requires intensive forecasting to ensure knowledge is retained and the successor is the right fit for the position. The eligibility requirements of the role will ensure which successor has the eligibility requirements to fulfill the retiring baby boomer position.

Determining the knowledge, skills, and abilities of successors is required to determine the best fit to replace a retiring baby boomer. Devising an action plan for potential successors helps recognize meaningful growth prospects. P3 acknowledged that the successor should have similar characteristics when planning to replace baby boomers. The successor should evolve into a better version of the previous leader. P5 encourages seeking something different and unique in the successor to take the leadership position to another level. Developing succession planning for future leaders is a systematic structure to ensure leadership continuity and advancement (Ali & Mehreen, 2020). When organizational leaders invest in future generation successors, the behavior is positively interchanged by successors increasing performance, commitment, and dedication

(Wainright et al., 2021). Based on the concept of transformational leadership, the development of successors will allow adaptation, innovation, and opportunities that lead to positive succession results and longevity (Magasi, 2021). Succession planning development plan prepares leaders to lead organizations into a new phase of success. Leaders engage in individualized consideration when determining future successors for positions. Early consideration prepares leaders to gain insight into what they are preparing the organization for future success.

Human resources professionals implementing early engagement in succession planning reflect positively on the process. P1 stated early engagement in succession planning in an organization gives leaders an idea of what to prepare for and embrace the needs of future generations to succeed. P3 and P4 stated that early engagement in succession planning helps them avoid pitfalls in staffing shortage in their organization. Foreseeing, designing, and organizing talent is a significant focus of transformational leadership and the basis of effective succession planning (Martin & O'Shea, 2021). Succession planning determines whether the organization is effective or ineffective (Manseya, 2022). The aspirations of employees should convert into goals for the company. The development of future leaders should be realistic and strategic to ensure goals can be reached and exceeded. Effective succession management planning includes organization, teamwork, effective communication, and morale (Ghazali et al., 2022). The establishment of a succession plan, organizational leaders offer the time and preparation necessary to confirm a fluid leadership transition. The necessity to implement succession

planning provides an organization with the support of sustainability, competitive edge, and security of its future.

Figure 2

Implementation of Succession Planning
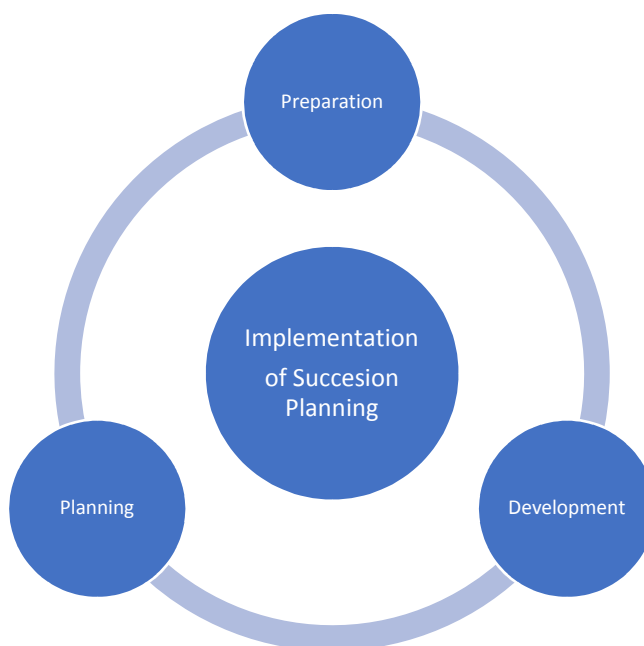
Theme 2: Effective Succession Planning Strategies

Succession means advancement, and without a motivating, proactive approach, your plan will fail (Bano et al., 2022). Theme 2 was generated through evidence collected from Research Questions 2,3,4, and 5. Leadership development programs, mentoring, and cross-training are the main strategies in succession planning. P1, P2, and P3 each incorporated a leadership program to engage future generations in succession planning. P4 and P5 engaged in mentoring programs. All participants in the study partake in cross-training as a succession planning strategy. Succession planning strategies connect the current talent with the future needs of an organization to ensure business continuity and

sustainability (Obianuju et al., 2021). The concept of these strategies entails intellectual stimulation, which is an element of transformational leadership theory. The commitment of the three strategies assists in the knowledge transfer from the retiring baby boomers to the future generation. Incorporating succession management strategies such as these provide forward-thinking leadership to retain knowledge, skills, and experience that continued success for the organization.

Organizational leaders realize the uncertainty of the environment in business. The retiring baby boomers are into retirement age, potentially leaving an organization vulnerable if not adequately prepared (Desarno et al., 2020). The future generations, such as millennials and Generation Z, are also looking for the best fit in their career that is satisfying and meets their overall need. P4 states the mentoring program's value assists in retaining good employees. Mentoring programs allow individuals to acquire new skills and gain experience that could help them further in their careers (Baker et al., 2019). Human resources leaders respond to this by offering incentives such as mentoring programs, education tuition assistance, bonus leave, and promotion opportunities to show employees they are willing to invest in their future career paths. Incentives like this reflect upon the element inspirational motivation in transformation leadership theory which encourages motivation in successors.

Mentoring programs strengthen succession strategies by placing the future generation of the organization with the retiring baby boomers to increase their knowledge and skills in the organization. Mentoring creates an action-oriented development and enhances the visibility of potential leaders (Baker et al., 2019). The goal of a mentor is to

help upcoming talent view the organization from a different scope and help understand the long term and short-term consequences (Hee et al., 2019). The transformation in perception is foundational to developing new leaders. Mentoring allows the mentee and the mentor further develop their leadership skills (Kao et al., 2021). In correlation to the literature, mentoring helps maintain internal talent management within an organization. Creating a mentoring program gives organizational leaders an insight into the value of continuous professional development. Engagement in mentorship helps cultivate a culture to support learning and growth. Mentoring also encourages employees to capitalize on knowledge transfer in other ways, like collaboration on assignments, classroom training, and participating in rotational assignments, which help prepare future organizational leaders.

A leadership development program facilitates leadership skills and capacity to excel personally and professionally in the organization (Wainwright et al., 2021). P2 and P3 stated that leadership programs are highly encouraged to create new successors in the organization. Unlike mentoring, leadership motivates prospects to achieve their goals. Human resources professionals are involved in developing leadership strategy and its implementation and oversight (Spina & Spina, 2022). The size of the organization is usually taken into consideration. Smaller organizations do not typically have a strategic program, whereas larger organizations tend to have a formal or administrative leadership process (Subramony et al., 2018). Human resources professionals focusing on leadership development will provide a realistic assessment of aligning the organization with future leaders for continued success. The inclusion of human resources in the many facets of

leadership development continues to thrive in organizations and recognizes the strategic need for results to address future leadership demands.

Cross-training allows employees to learn different tasks in an organization. Integrating cross-training initiatives with an organization's succession plan will enable employees to simultaneously acquire knowledge and skills to assist them in their current roles. P2 expresses caution with cross-training, as it is effective, but one must ensure unpleasant habits are not inherited. P1 conveys that cross-training provides organization safety precautions for not only retiring baby boomers but also for unforeseeable vacancies. The integration will help them identify how acquiring new skills will benefit them and help them achieve more with your organization long term (Ninan et al., 2019). The effects of cross-training have long-term benefits for the employee and organizations. The main objectives of cross-training are to increase knowledge and skills, flexibility, and an overall better understanding of the organization (Vasanthi & Basariya, 2019). Cross-training increases viability and provides connections between organization units (Anyim, 2021). Cross-training improves the talent pipeline validity and uncovers many hidden skill sets. The organization will be far more flexible and sustainable, imparting cross-training when unforeseen challenges arise.

The use of these strategies in succession planning helps support transformational leadership in the future of the organization. P3 suggested when executing succession planning, the goal is not to strive for complacency in the position but to seek growth with the successor. P4 and P5 stated the transformation that occurs in succession planning should benefit all parties, from the retiree, successors, and organization. P1 explained the

success of implementing effective succession planning strategies helps retain great leaders and maintains the organization's competitive edge. P2 implied how identifying the wants and needs of the new generation of leaders versus the outgoing baby boomer leaders must be assessed to warrant effective succession planning strategies. A component of an organization's succession planning strategy is identifying talent with the potential to fill the retiring baby boomers and other unforeseeable vacancies (Chang & Besal, 2020). Internal selection should be prioritized to avoid outside recruitment costs and moral ramifications. The introduction of succession planning as a present factor versus a future factor in an organization allows successors to emerge more prepared to take over (Raby & Valeau, 2021). The process of succession planning will have barriers and resistance. Applying the tools to overcome those barriers will assist in the successful transition.

Figure 3

Effective Succession Planning Strategies

Theme 3: Human Resources Role in Succession Planning

Theme three is the outcome of evidence collected from research questions 4, 5, and 7. Human resources professionals are often viewed as the facilitator of knowledge management and transfer from the retiring baby boomers to the future generation of the organization. Effective succession planning depends on the partnership between the human resources department and the organization (Bleich, 2019). Human resources professionals should oversee the succession planning process and evaluate what skills, experiences, strengths, and competencies make a successful leader (Mehreen & Ali et al., 2022). Human resources leaders can help organizations distinguish and assess potential candidates from future generations within a structured framework and process. Throughout the succession planning process, human resources and organizational leaders

will be accountable for recruitment while ensuring alignment with overall business objectives and strategies.

All participants stated that human resources professionals are the first line of defense in succession planning. P3 noted that you must sell the succession planning plan to the organizational leaders, especially if this is the first experience. Human resources leaders must ensure a streamlined transition from retiring baby boomers to future successors (Desarno et al., 2020). Training and development provide a cultural alignment, and the successor possesses the knowledge, skills, and ability to transition successfully (Ghazali et al., 2022). In creating and developing succession planning, you must find a fit and focus on covering multiple generations. Human resources leaders must assess all the qualified employees that will replace the retiring baby boomers.

P4 asserted human resources leaders are considered change agents when implementing new processes into the organization. P5 elaborated on how human resources managers are often the primary connection between employees and management. When hiring a new successor, human resources leaders must measure how each step is conducted and its effectiveness. Human resources leaders must prepare for the knowledge transfer between retiring Baby Boomer executives and future leaders (Zoller, 2018). The measurement used in succession planning could range from in-depth assessments, return on investment, mentoring, and leadership development programs (Jackson & Dunn-Jensen, 2021). Mentorship is the assumption that you have replacements on standby. Human resources and organizational leaders must develop a clear plan for a current and future leader's career path (Desarno et al., 2021). As the plan

facilitator, human resources professionals ensure that the accountability of all parties is assessed to ensure effective succession planning.

The most significant barriers in succession planning were financial cost, timing, job risks, and management resistance. Human resources professionals develop evaluation tools to assess the effectiveness of succession planning. Evaluation tools such as surveys, interviews, and expense reports are used to access this information (Zhao et al., 2022). Feedback from the evaluation methods will give us knowledge on changes and improvements. Implementing succession planning, especially for the first time in an organization, can be challenging (Okwakpam, 2019). P2 and P3 discuss challenges and difficulties with succession planning, such as behaviors, attitudes, and work and home life balance. P1 states even after successfully implementing succession planning, it sometimes becomes a costly investment. Overcoming barriers to succession planning, especially when it comes to retiring baby boomers, must be addressed promptly (Ballaro et al., 2021). Human resources professionals must incorporate prevention methods in succession planning to avoid such pitfalls. Many human resources departments have implemented employee assistance programs to address these barriers when they occur.

Theme 4: Knowledge Transfer in Succession Planning

Organizational and human resources leaders must demonstrate bold leadership in instituting policies, practices, and cultural changes to facilitate the smooth and comprehensive transfer of knowledge within their organizations (Bano et al., 2022). All the participants stated the knowledge transfer from retiring baby boomers to future generations was one of the most important parts of the succession process. P1

acknowledged that baby boomers' knowledge was why organizations thrive. P5 stated baby boomers possessed a work style and ethic that you rarely see in talent today. The process is tedious but rewarding when done effectively. P2 states human resources leaders generate reports of retirement eligibility and eligible individuals for promotion, which helps to determine the individuals to include in the succession planning. Engaging in succession planning initiates the beginning of the knowledge transfer of retiring baby boomers. The final theme is the conclusion of evidence received from participants from research questions 6 and 7.

Understanding the workplace demographics helps organizational leaders assess the talent in their organization. Forecasting the future needs of an organization is essential to its success (Bidian & Evans, 2018). Evaluating the number of baby boomers retirement eligible gives leaders an idea of the critical positions that will be available. P3 stated that timing is one of the essential factors in succession planning. Succession planning saves time and cost when effectively implemented (Abdullahi et al., 2022). The demographic information will allow organization and human resources leaders to prioritize and assess the positions most critical to fulfilling. The selection of available candidates begins after the demographic process.

P2, P4, and P5 discussed the prioritization of positions and knowledge needed to be captured from retiring baby boomers. After determining the demographics, human resources and organizational leaders collaborate on which positions to fill, and important knowledge items must be completed first (Bano et al., 2022). Once the process of demographics and knowledge capture has been completed, choosing the successors and

knowledge transfer tools must be selected. P1 stated this part of the process was the most difficult decision to make with leaders. Leaders review factors such as organizational commitment, leadership competencies, educational background, and work ethic to match successors for future vacancies (Aungsuroch et al., 2022). The selection of successors could be internal or external. Choosing external successors could take more time and money (Bano et al., 2022). The collaboration of leaders making the final decisions on successors and knowledge transfer tools must be done carefully in the organization's best interest.

The execution of the knowledge transfer differed among the participants. The three most successful succession strategies discussed were leadership development, mentoring, and cross-training. Mazorodze and Buckley (2020) define individual competencies as the knowledge required to achieve a given outcome, the skills to implement that knowledge, and the personality characteristics necessary to implement the knowledge and skills to attain the desired income. The knowledge transfer process focuses on proper knowledge execution from retiring baby boomers to future generations. The process must include evaluation and knowledge storage systems to ensure effective transfer.

The evaluation of the knowledge transfer and the placement of successors is the final step. All the participants mentioned this step could not be avoided as it informs whether the succession plan effectiveness or modifications are required. The three measures used the most by all participants to measure knowledge transfer effectiveness in succession planning were turnover rates, retention rates, and the overall expenses of the

process. The barriers to succession planning reflect technology and culture as the main

risk (Suwaidi et al., 2020). Engaging knowledge transfer tools that assist with technology

and culture in succession planning will offset the barrier. Human resources and

organizational leaders should assess the steps in this model to ensure the effective

transfer of knowledge and succession planning effectiveness.

Applications to Professional Practice

Succession planning is a technique that can foster future leaders for the

organization and inspire employees to share in professional development (Ramola &

Rangnekar, 2021). Succession planning is the link to engage future generations with the

retiring baby boomers' knowledge, skills, and experiences. Human resources practitioners

and organizational leaders have argued for succession planning practices that facilitate

better talent identification and create stronger leadership strength (Chang & Besal, 2021).

The development of transformational leaders will ensure that succession planning

strategies are introduced efficiently and effectively to maintain organizational success

(Jackson & Dunn-Jensen, 2021). Human resources engagement in succession planning is

essential to an organization's business strategy. The application of succession planning

shows initiative on behalf of organizational leaders to be accountable for the continued

success of the organization.

Leaders recognize that good leadership matters and that sound succession

practices can affect business continuity and maintain competitive advantage. (Manseya,

2022). Proper succession planning cultivates the next generation of leaders to be creative,

innovative, and assertive in taking on leadership roles in the organization. Engaging in

succession planning strategies minimizes risks that organizations will face if ignored. Based on the findings, the benefits of implementing succession planning strategies to replace baby boomers include providing leadership continuity, reducing turnover, increasing knowledge retention, and economic gain.

The results of this study reflected several strategies that will take the organization to the next phase with future generations. The goal of succession planning accumulates in engaging in strategies to motivate and enhance successors' value and productivity in the organization (Mehreen & Ali, 2022). The process of succession planning entails the development of a transformational leader who is charismatic, motivational, and a change agent. With future generations taking over the retiring baby boomers vacancies, most organizational leaders are looking for this effect (Woodfield & Husted, 2022). With incoming generations such as Generation X, Y, and Z, succession planning strategies will streamline the transition into leadership in the organization. Integrating leadership styles with succession planning will also help shape the succession planning process. For example, incorporating the contingency leadership style within the leadership development will align the future candidate with the organization that possesses qualities that best fit the contingent plan of the organization. In situational leadership integrated within succession planning, the successor will be based on competence and commitment. Based on the conceptual framework of transformational leadership, which allows succession planning strategies will create opportunities to secure the best candidate to replace retiring baby boomers, retain their knowledge and foster an innovative workplace for future generations.

Implications for Social Change

The implication for social change includes applying succession planning strategies to increase the knowledge, skills, and experiences of future generations in an organization. The findings in this study reflect the importance of implementing these plans to align with the overall organization strategy. The knowledge gained from employing these strategies would influence policies to create leaders to innovate new ideas and sustain business efficiency. Many organizations have established social responsibility statements to ensure their brand supports the environment and communities around them. With the retiring of baby boomers from the workforce, employing succession planning strategies will create leaders who can adapt to cultural change, retain knowledge, and continue organizational growth.

The findings in this study may also contribute to social change as human resources managers develop new strategies to implement succession planning among the remaining generations. These strategies could focus on pursuing knowledge transfer for future generations in the workforce. Along with retiring baby boomers, organizational leaders experience unforeseen vacancies such as furloughs, layoffs, and closures. The implementation of succession planning has taken on a different meaning by strategizing career plans for business continuity during a shortfall. Furthermore, these succession planning strategies promote knowledge increase, creating successful and diverse leaders, and awareness in an environment to increase understanding and relationship building among the society and generations.

Recommendations for Action

The finding of this study may support business leaders in deploying the appropriate succession management strategies that might help their organizations replace retiring baby boomers and other unforeseen vacancies. Based on the research results, I recommend current and future leaders:

- Human resources and organizational leaders should align their strategies to implement succession planning strategies to develop future leadership for their organization

- Human resources managers should assess the knowledge, skills, experiences, and leadership styles that will best fit the organization.

- Leaders should plan to employ internal and external mentors to ensure the right attitudes and behaviors to encourage future leaders during succession planning.

- Succession planning strategies must be designed to capture the needs of future generations (Generation X, Y, Z)

- Organization and human resources leaders will provide incentive programs such as tuition assistance, eLearning, bonus leave, and promotion opportunity to influence support for succession planning strategy.

After the conclusion of this study, I plan to work as a consultant and integrate the information I gathered by conducting this study and develop a succession planning tool that businesses may use to develop talent in their organization. I plan to explore further how different generations experiences succession planning and determine their

effectiveness by engaging with the program. I will make it my social responsibility to employ as many individuals as possible to explore succession planning strategies.

Recommendations for Further Research

The purpose of this qualitative, single case study was to discover succession planning strategies human resources managers use to oversee the transition of experience, knowledge, and skills influenced by baby boomers. Numerous limitations were discovered while conducting research for this study. The participants interviewed were all human resources managers in the southeast region of the United States. Future researchers should expand the research area location and engage different participants. I recommend expanding the research to other areas of expertise, such as medical, education, or social services. I further recommend considering using different research methods and sample sizes.

I conducted this study during an ongoing global pandemic called COVID-19, which hindered face-to-face interviews. When the pandemic has subsided as a worldwide crisis, future researchers may return to doing face-to-face interviews to access the full emotions and expressions of the participants during the interviews. Demographics were determined to be a limitation in this study. The demographics may be investigated as further research by conducting research by gender, career background, or length of employment in the field.

Reflections

Pursuing my doctoral degree has been a personal goal of mine. I am grateful to have the support from family, friends, and Walden University to accomplish my final

academic achievement. The process has not changed my personal biases. However, it has opened my mind to new ideas and adventures while seeking opportunities to continue to be a great learner. The knowledge and experiences I have received on this journey will give me the confidence and support to impact future generations to strive to be great successors in their respective organizations and communities. The identification of my role to be socially responsible for focusing my time, energy, and resources on creating new leaders for a better tomorrow.

When I selected my topic for my study, I pursued something that can be taken from one generation to the next to improve our way of life and meaning. Once I started collecting data and immersing myself in my research, I knew I had made the right decision. The doctoral study process has instilled and strengthened my time management skills, self-discipline, and ethical awareness, allowing me to address any difficulties and seize all opportunities available. The diversity of my participants inspires me to be forward-thinking and accomplish my aspirations of creating future successors through succession planning. I will research and provide a universal succession planning tool that can be used worldwide to produce great leaders and improve our environment.

Conclusion

The scope of this study was to discover succession planning strategies human resources managers use to oversee the transition of experience, knowledge, and skills influenced by baby boomers. Succession planning is a technique that can foster future leaders for the organization and inspire employees to share in learning improvements (Ali et al., 2019). Five human resources managers from the southeast United States

participated in the semistructured interviews. The findings emerge four themes: the need to implement succession planning, succession planning strategies, human resources role in succession planning, and the knowledge transfer in succession planning from retiring baby boomers to future generations. Leaders who employ succession planning strategies in their organizations realize its importance and the viability of why it is needed.

Succession planning is necessary for the survival and longevity of an organization (Chia et al., 2021). Implementing succession planning strategies has proven to have a great return on investment for organizations. The benefit of retaining baby boomers knowledge comes at an invaluable cost that no organizational leaders would want to encounter. The transfer of retiring baby boomers knowledge is imperative to employ this information to ensure the perpetuity of an organization. The loss of losing retiring baby boomers will have a significant impact on organizations, however, early succession planning can avoid the inevitable of this loss.

Succession planning is essential to retain retiring baby boomers' knowledge, skills, and experience. The threats of not engaging in succession planning could result in economic, talent, and organizational loss. The sooner organizational leaders engage in succession planning, the better the outcome. The integration of human resources strategy that includes succession planning and overall organization strategy will benefit the organization sustainability, financial gain, and competitive advantage.

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Appendix A: Participant Invitation Letter

Dear Invitee,

My name is Sonya McFadden. I am a doctoral student at Walden University's Doctor of Business Administration Program. You are invited to participate in a research study about Strategies for Succession Planning of Retiring Baby Boomers. This research aims to explore how succession planning strategies may be used to replace the retiring baby boomers in your organization. The researcher is requesting human resources managers located in the southeast region of the United States who have experienced retiring baby boomers leaving the workforce and creating succession plans to replace them.

The study involves collecting data on succession planning strategies through interviews with qualified participants. Participation is entirely voluntary, and you may withdraw from the study at any time. The interview process would be audio-record and only take 30-60 minutes. The outcome of these strategies could focus on pursuing knowledge transfer for future generations in the workforce. The development of succession planning strategies derived from this study will generate a road map for managers to integrate business principles with succession planning strategies to create the sustainability of success in an organization.

Appendix B: Consent Form

CONSENT FORM

You are invited to take part in a research study to discover succession planning strategies human resources managers use to oversee the transition of experience, knowledge, and skills influenced by baby boomers. This form is part of a process called "informed consent" to allow you to understand this study before deciding whether to take part.

This study seeks volunteers who are:
- Human resources managers located in the southeast region of the United States who has experienced the phenomenon of retiring baby boomers leaving the workforce and creating succession plans to replace them.

This study is being conducted by a researcher named Sonya McFadden, a doctoral student at Walden University.

Procedures:
This study will involve you completing the following steps:

> The interview process would be audio-recorded, and only take between 30-60 minutes. The data collected from the interviews will be sent back to you via email for validation of accuracy which should not be no longer that 30 minutes.

Here are some sample questions:
8.   What was the necessity for developing succession planning strategies for the retiring baby boomers?
9.   What best practices have your leaders applied to retain knowledge, skills, and experience possessed by retiring baby boomers?

Voluntary Nature of the Study:
Research should only be done with those who freely volunteer. So, everyone involved will respect your decision to join or not.
If you decide to join the study now, you can still change your mind later. You may stop at any time.

Risks and Benefits of Being in the Study:
Being in this study could involve some risk of minor discomforts that can be encountered in daily life such as sharing sensitive information. With the protections in place, this study would pose minimal risk to your well-being.

This study offers no direct benefits to individual volunteers. The aim of this study is to benefit society through social change, as human resources managers develop new

strategies to implement succession planning for future generations. The outcome of these strategies could focus on pursuing knowledge transfer for future generations in the workforce. The development of succession planning strategies derived from this study will generate a road map for managers to integrate business principles with succession planning strategies to create the sustainability of success in an organization.

Once the analysis is complete, the researcher will share the overall results by emailing you a summary of the results.

Payment:

There is no compensation for participation.

Privacy:

The researcher is required to protect your privacy. Your identity will be kept confidential within the limits of the law. The researcher will not use your personal information for any purposes outside of this research project. Also, the researcher will not include your name or anything else that could identify you in the study reports. If the researcher were to share this dataset with another researcher in the future, the dataset would contain no identifiers so this would not involve another round of obtaining informed consent. Data will be kept secure by an encrypted USB in a locked safe. Data will be kept for a period of at least five years, as required by the university.

Contacts and Questions:

You can ask questions of the researcher by email at sonya.mcfadden@waldenu.edu. If you want to talk privately about your rights as a participant or any negative parts of the study, you can call Walden University's Research Participant Advocate at 612-312-1210. Walden University's approval number for this study is **04-11-22-0651468**. It expires on **April 10, 2023**.

You might wish to retain this consent form for your records. You may ask the researcher or Walden University for a copy at any time using the contact info above.

Obtaining Your Consent

If you feel you understand the study and wish to volunteer, please indicate your consent by replying to this email with the works "I consent ".

Appendix C: Interview Protocol

Outline of the Interview Process:

1.   Introduce myself as the interviewer.

2.   Explain the purpose of the research and extend gratitude and appreciation.

3.   Present the information letter and ask for participants to sign the informed

consent.

4.   Present the interview protocol and explain the topic and time involvement.

5.   Explain the roles and expectations of both the interviewer and interviewee.

6.   Request permission to record and manually document the interview.

7.   Ask any remaining follow up questions.

8.   Schedule a second interview for member checking, allowing participants to

approve responses and use any resources provided.

9.   End the interview and extend greetings and thanks again.

Body of the Interview:

The below interview questions will be asked of participants.

1.   What was the necessity for the development of succession planning strategies for

the retiring baby boomers?

2.   What best practices have your organization applied to retain knowledge, skills,

and experience possessed by retiring baby boomers?

3.   What types of intrinsic and extrinsic incentives or bonus is encouraged to

implement succession planning?

4.   What measurements are in place to ensure that the succession planning strategies are effective?

5.   How did you overcome to implement succession planning strategies for retiring baby boomers?

6.   What succession planning strategies have been the least effective, and why?

7.   What else would you like to share regarding succession planning strategies for retiring baby boomers that we have not discussed?